MaintenanceDirect User Manual

Requester Guidelines

Version 2.0

SchoolDude.com, Inc.

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Requester Table of Contents:

Requester **1**
I. So You're a Requester! Now What? 1
II. You Are here: The Work Order Request Page 7
III. The Settings Page 8
IV. Maintenance Request 10
V. My Requests 13

Requester

I. So You're a Requester! Now What?

(Getting started with MySchoolBuilding.com.)

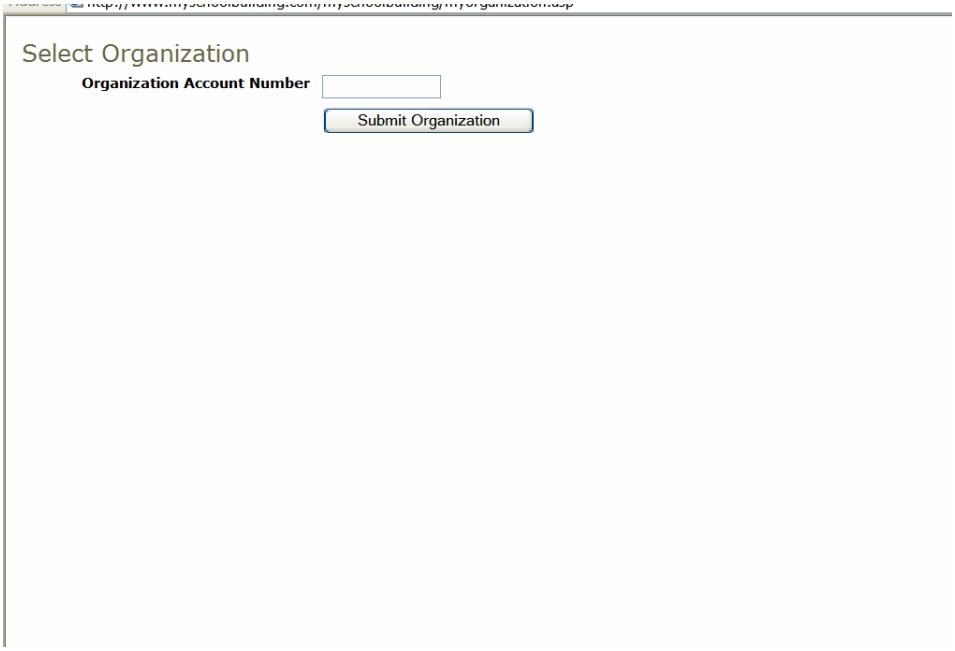
MySchoolbuilding.com is where you as a Requester will go to make all of your new work order requests. There are two ways that a Requester can be entered into the system:

- The MaintenanceDirect Administrator can add the Requester into the system.
- The Requester can add themselves into the system.

If you are a new Requester (you haven't been entered into the system before), follow these steps to set up your Requester name and enter yourself into the system:

1. Go to www.myschoolbuilding.com.

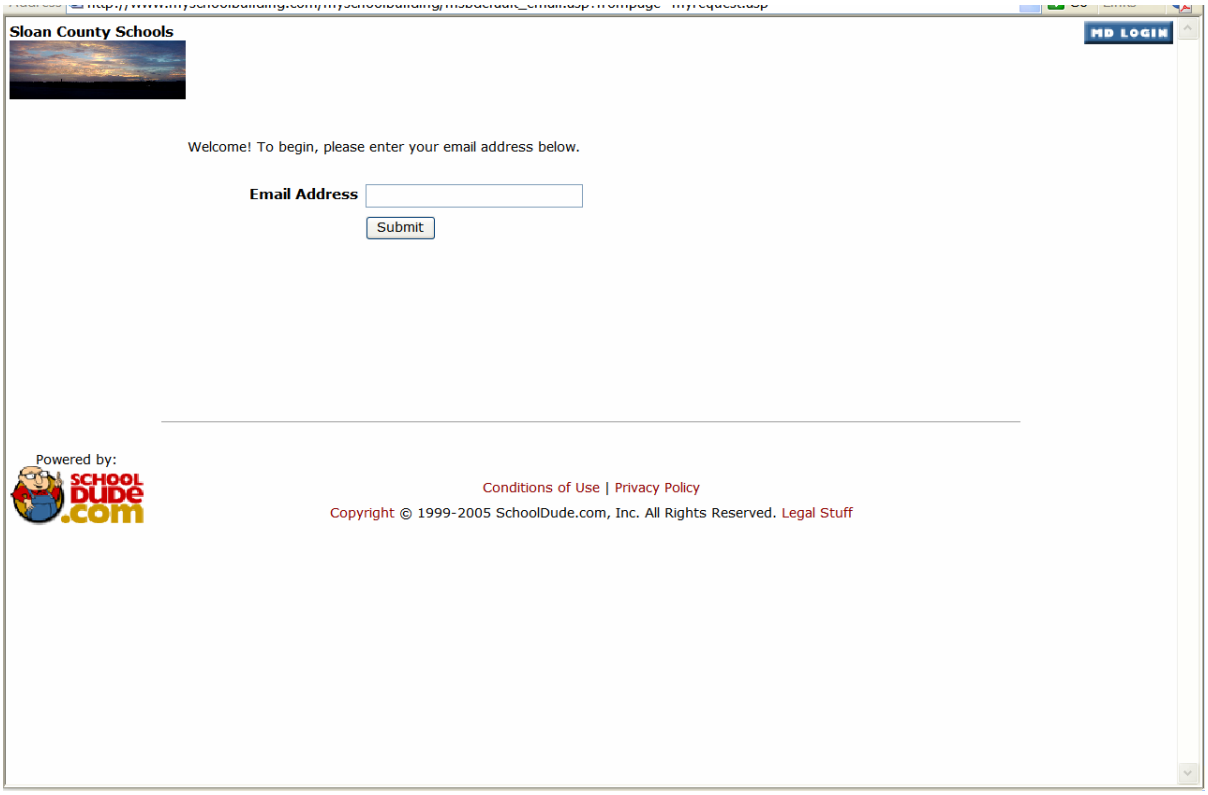
2. You will see the following page:



3. Enter your organization account number in the space provided (your Administrator can give it to you).

4. Click Submit Organization.

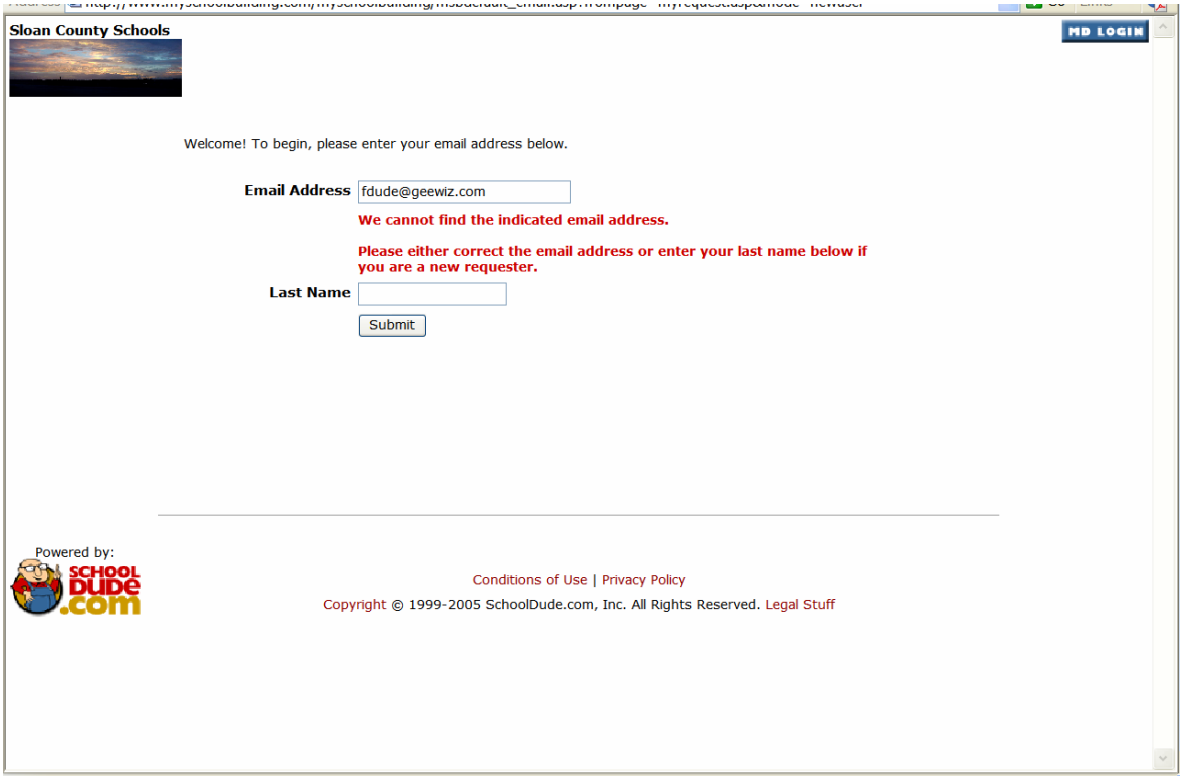
5. Next, you will be taken to the MySchoolBuilding.com login page for your educational facility. You will see your facility's name and/or logo in the top left-hand corner and the words "MD Login" in the top right. See below:


Sloan County Schools
MD LOGIN
Welcome! To begin, please enter your email address below.
Email Address
Submit
Powered by:
SCHOOL DUDE .com
Conditions of Use | Privacy Policy
Copyright © 1999-2005 SchoolDude.com, Inc. All Rights Reserved. Legal Stuff

6. Enter your email address in the space provided.

7. Click Submit.

8. As you are a new Requester, you will then see the following page:


Sloan County Schools
MD LOGIN
Welcome! To begin, please enter your email address below.
Email Address
fdude@geewiz.com
We cannot find the indicated email address.
Please either correct the email address or enter your last name below if you are a new requester.
Last Name
Submit
Powered by:
SCHOOL DUDE .com
Conditions of Use | Privacy Policy
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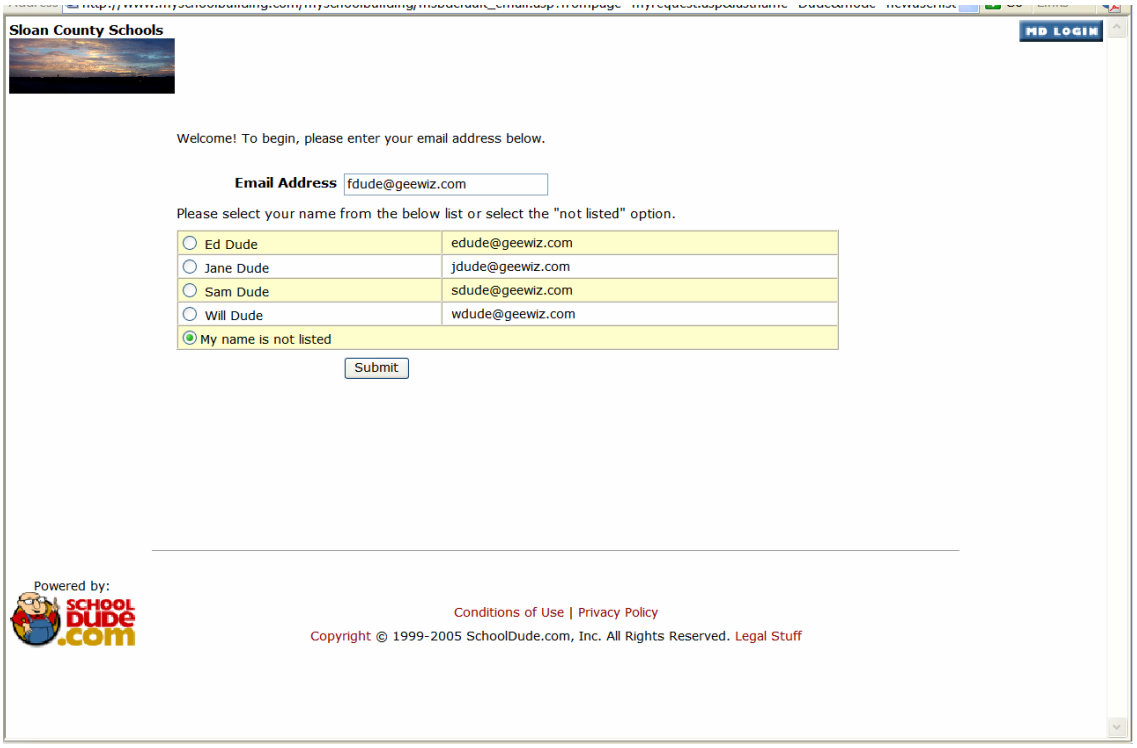
SCHOOLDUDE SAYS: If this page doesn't come up when you enter your email address and you see an entirely different page with the word "Welcome" at the top, followed by a form with some of your info already in it, skip ahead to step 17.

9. Enter your last name into the box provided.
10. Click Submit.
11. Next, you should see the page below:


Sloan County Schools
MD LOGIN
Welcome! To begin, please enter your email address below.
Email Address fdude@geewiz.com
Please select your name from the below list or select the "not listed" option.
Ed Dude edude@geewiz.com
Jane Dude jdude@geewiz.com
Sam Dude sdude@geewiz.com
Will Dude wdude@geewiz.com
My name is not listed
Submit
Powered by:
SCHOOL DUDE .com
Conditions of Use | Privacy Policy
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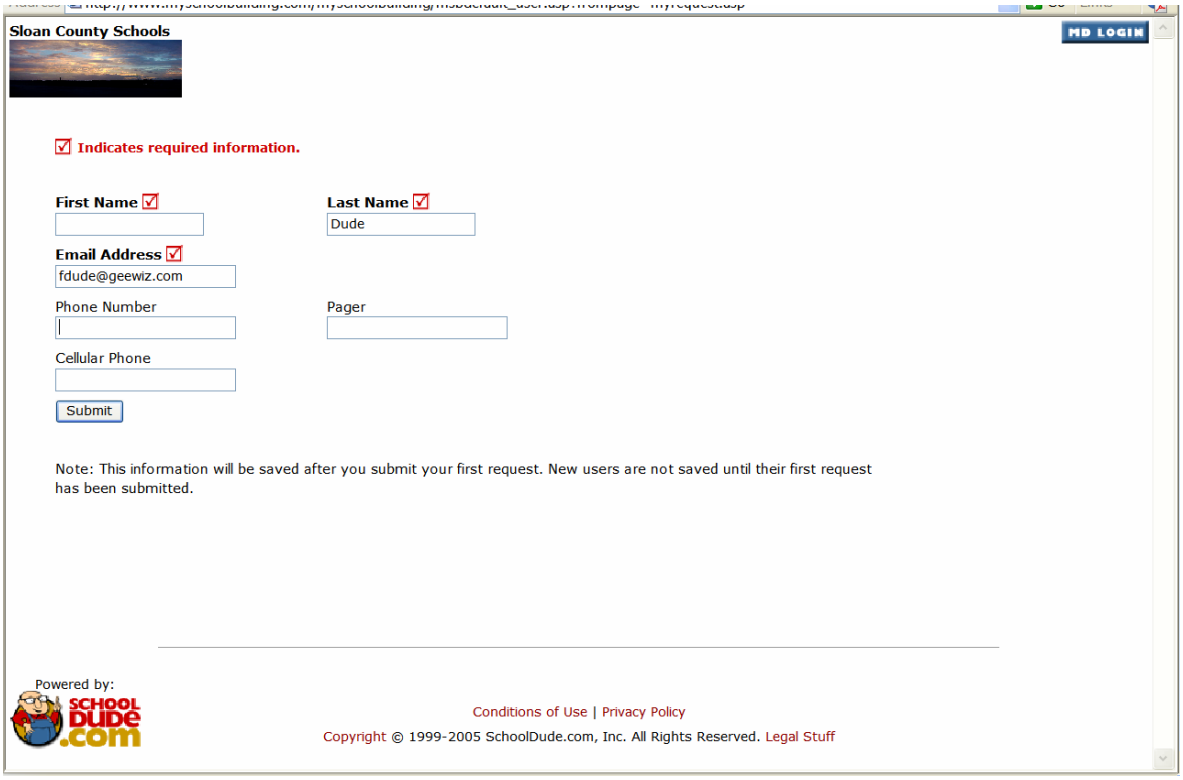
12. Your email address should already be entered into the box provided. If it's not correct, however, enter it correctly. Make sure that the circle next to "My name is not listed" has been clicked and contains a green dot.

13. Click Submit.

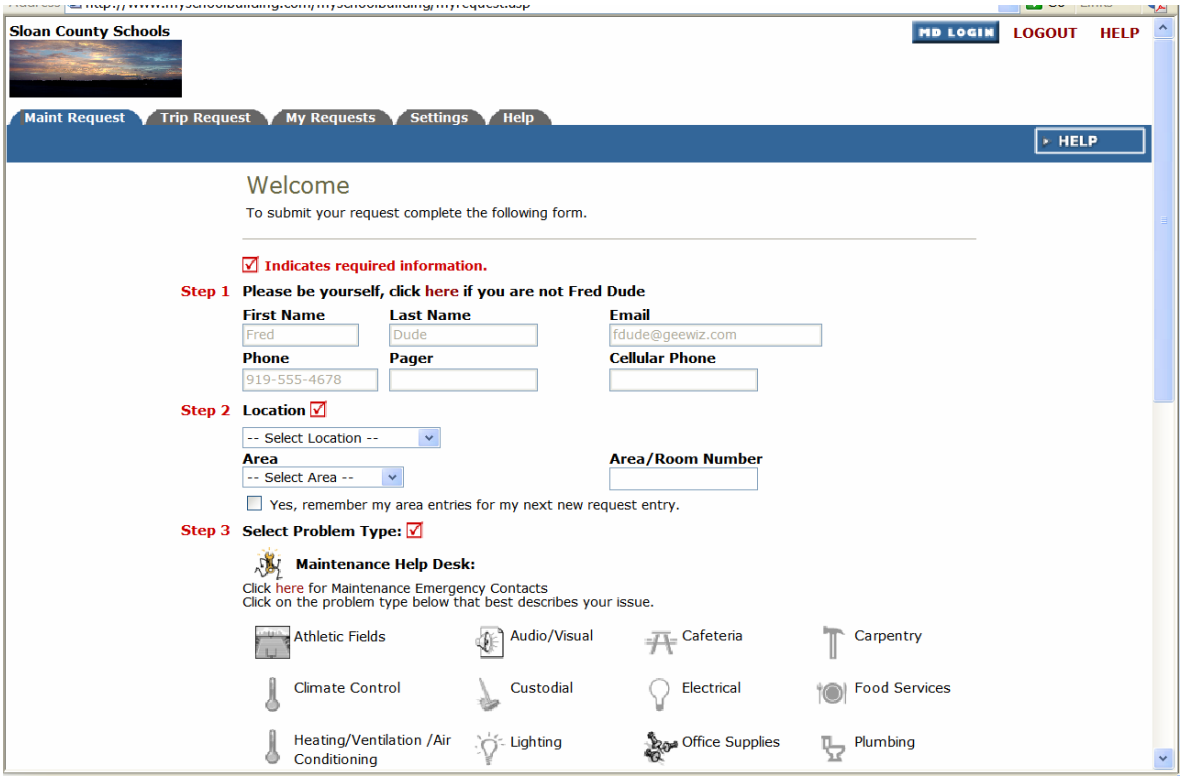
14. The page you see next should look something like this:



15. Your last name and email address should already be filled in. Fill in the remaining fields (first name is the only one required) if you wish.

16. Click Submit.

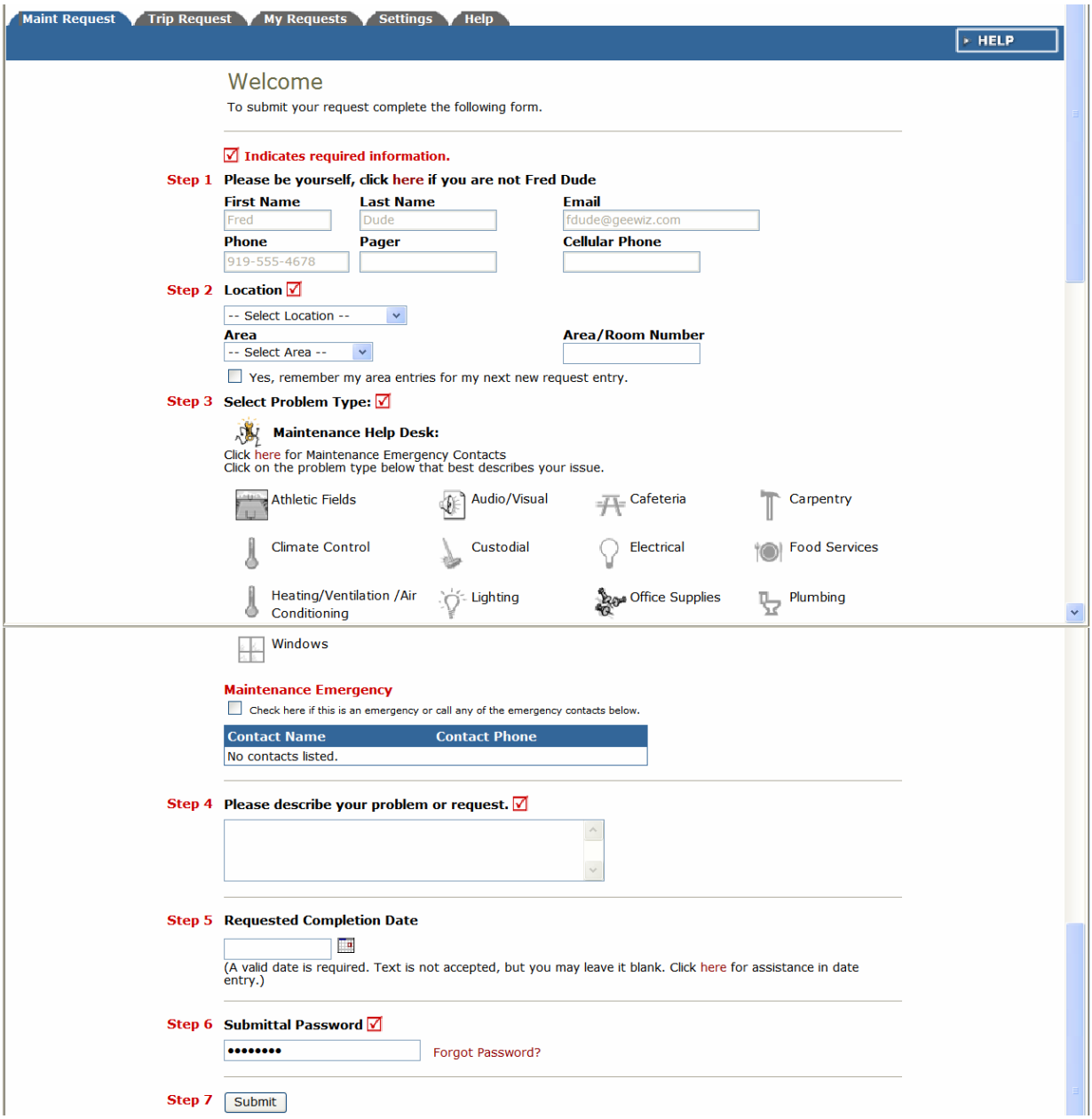
17. The next page you are taken to should look something like this:



18. This is the point where all Requesters start once they are in the system: the **Work Order Request form**. Welcome aboard!

II. You Are Here: The Work Order Request Page.

Once you've visited www.myschoolbuilding.com and logged in using your email address, you will be taken directly to the work order request page. This serves as your Home page for MySchoolBuilding.com and should look something like this:

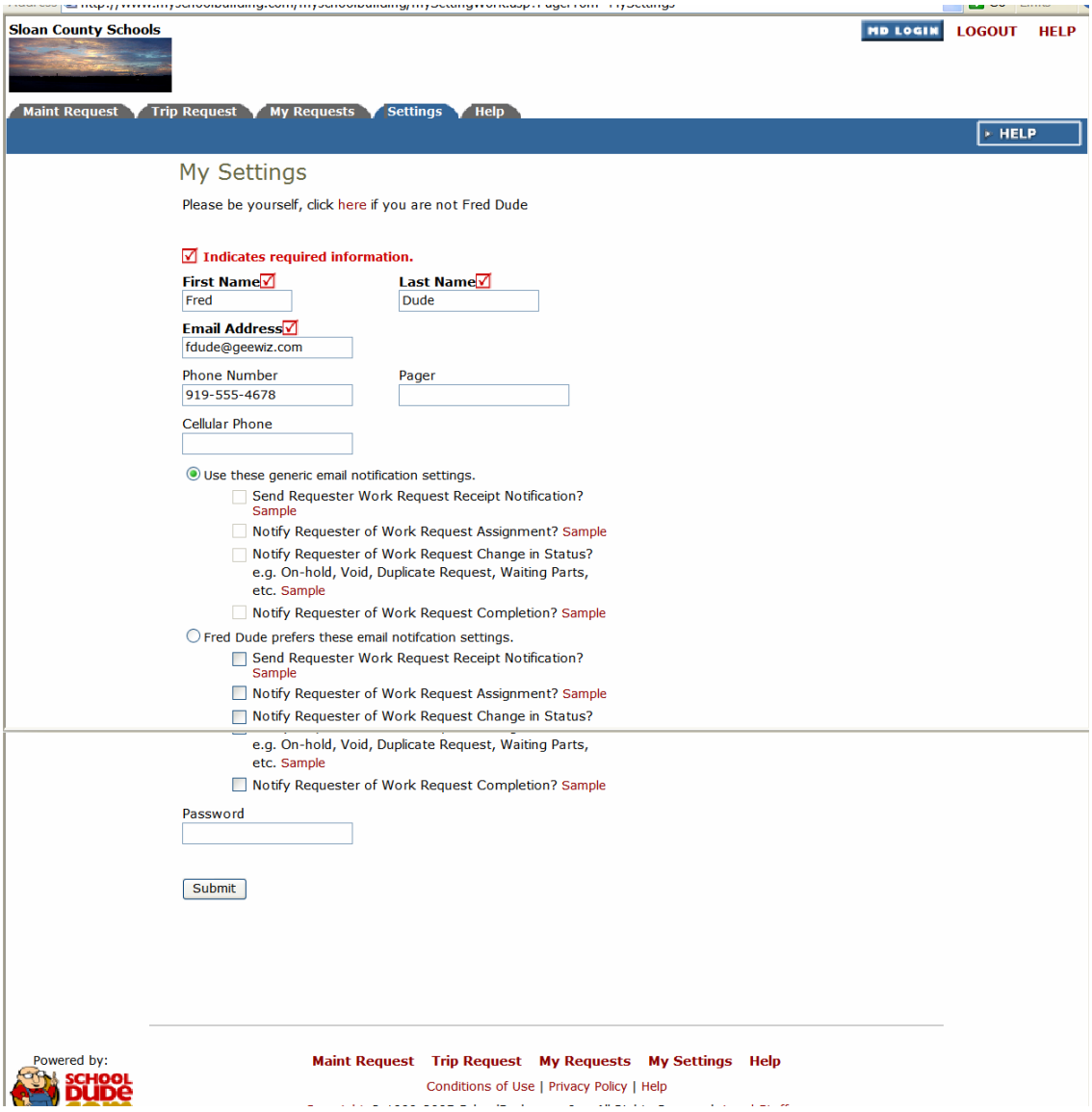


Across the top of the page, you'll notice five tabs labeled "**Maint Request**", "**Trip Request**" (if you have TripDirect), "**My Requests**", "**Settings**", and "**Help**". These tabs are how you navigate to the information that you need. In the following sections, we'll show you around MySchoolBuilding.com and each tab will be explained. You'll see what they contain and how to use them. (We'll get into the actual work order request a little further along.)

III. The Settings Page: Your Information in a Nutshell.

Before we get started in a bit with making work order requests, let's take a moment to check out the **Settings** page, which contains your information as entered by the Administrator during the Account Setup process. If you set up your own account, this page will show the information you entered earlier. Use this page to edit your information.

The **Settings** page looks like this:

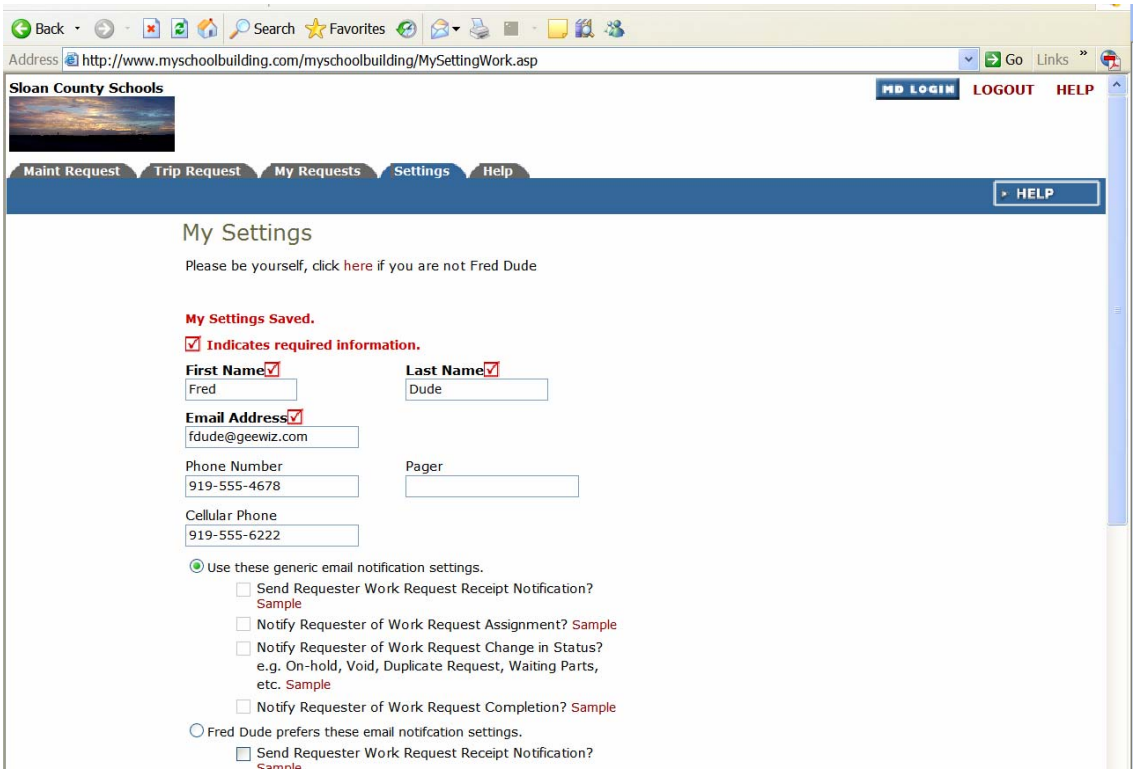


- Make any changes you wish to make, enter your password at the bottom, and click Submit.

OR

- To continue without making any changes, simply click the Back button at the top of your page or click the Tab of the page you wish to go to next.

If you have made changes, the page will refresh to bring up the same screen only now, the words "My Setting Saved" will appear in red at the top of the page (see below). Proceed by clicking the Tab of the page you'd like to go to next, up near the top of the screen.



IV. Maintenance Request: MD in Action

Now that you've logged in and checked out your settings page to make sure that all of your information is correct, we'll move on to what you're really here for: making work order requests.

First, let's look at **Work Order Statuses**:

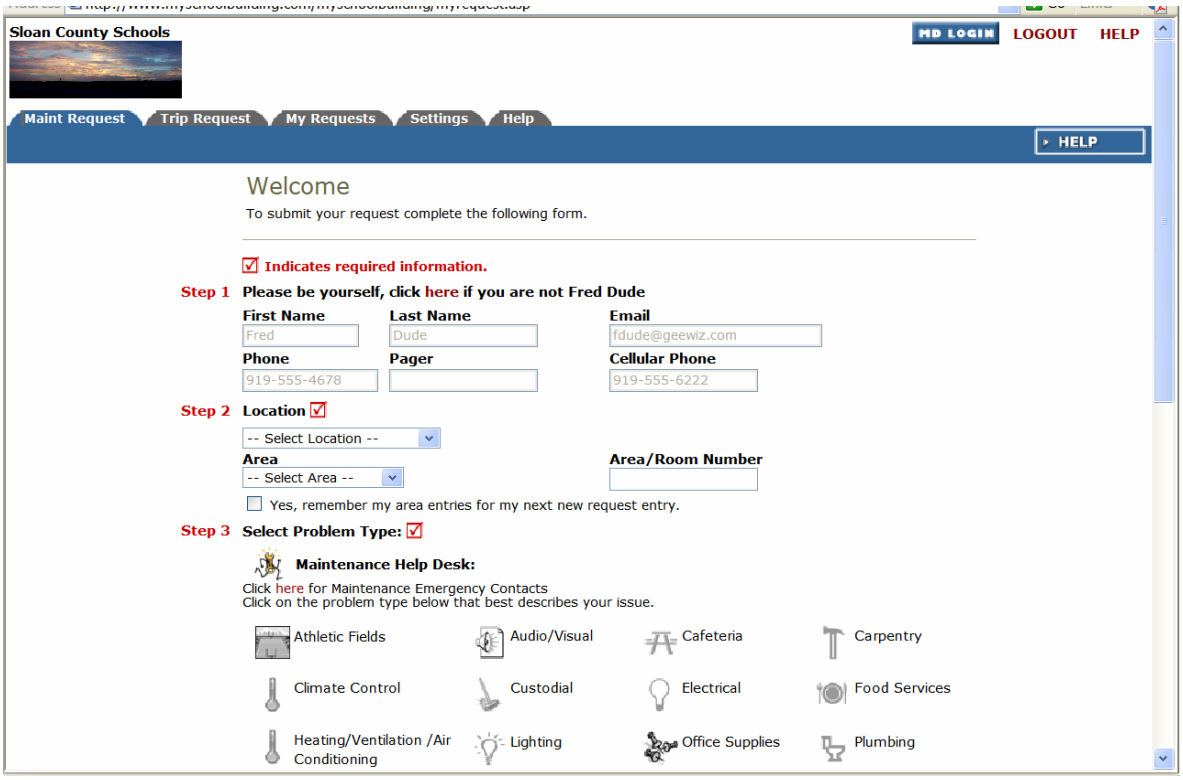
1. **New Request**: All work orders initially are set to new request. Generally, "new request" means they have not been assigned to someone for the work to be completed.
2. **Work in Progress**: Any work order assigned or scheduled to be completed would be considered as work in progress.
3. **Complete**: A complete status signifies that all the actual work has been done. All purchases and labor transactions may not be entered into the system. This will alert requesters that the work has been done.
4. **Closed Work Order**: Once all transactions and notes are added to a work order, you would close it. Once a work order is closed, you cannot add any more transactions (you would have to change the status back to "complete" to add more transactions).
5. **Declined**: The declined status defines any work orders that will not be done. They may be declined by a principal (if site administrator approval routing is set up) or by a person in the maintenance department.
6. **Parts on Order**: This defines any work order waiting for parts before continuing.
7. **Duplicate Request**: Any work order entered twice or previously requested.
8. **Void**: Voided work orders are work orders you would like to remove and will not show up in any reports unless specifically requested. You **CAN'T** delete a work order. Instead, you would void them out of the system.
9. **On Hold**: Work placed on hold for any reason besides waiting on parts would have this status.
10. **Waiting for Information**: If you ware waiting for more information from the requester or another person, you would want to set this as the status.
11. **Open Extended**: Any work order kept open for an extended amount of time. This can be used to keep track of labor hours for a general task done daily.
12. **Pending**: All PreventiveMaintenance work orders (if your educational facility owns PMDirect) will initially have a status of "pending".

➢ *Now that we've got Statuses out of the way, let's move on to the actual work order request, shall we?*

Requesting Work:

The **Maint Request** page (reached by clicking the tab near the top of the page from wherever you are in MySchoolBuilding.com) displays the form you'll fill out each time you want to request that work be done. Those fields marked with a red check-mark in a box (☑) are required and can't be skipped. The rest, you should just fill in as you are able to make the work request as detailed and helpful to those processing it as possible (this can speed the process up a bit).

Here again is a view of the work order request page:



Follow these steps to fill out the form (It'll only take a minute or two!):

- ☑ Enter your Location, Building, Area, and Area Number.
- ☑ Select the Problem Type that best describes your issue. For example, if a toilet is leaking, that would be a plumbing issue. Once you click on a problem type, the page will refresh and your problem type will be highlighted with a red circle. If this is an emergency, check the Maintenance Emergency box below the problem types list.
- ☑ Describe your problem or request.

- Enter the Requested Completion Date. Click the calendar icon next to the date field to choose a date from the calendar.

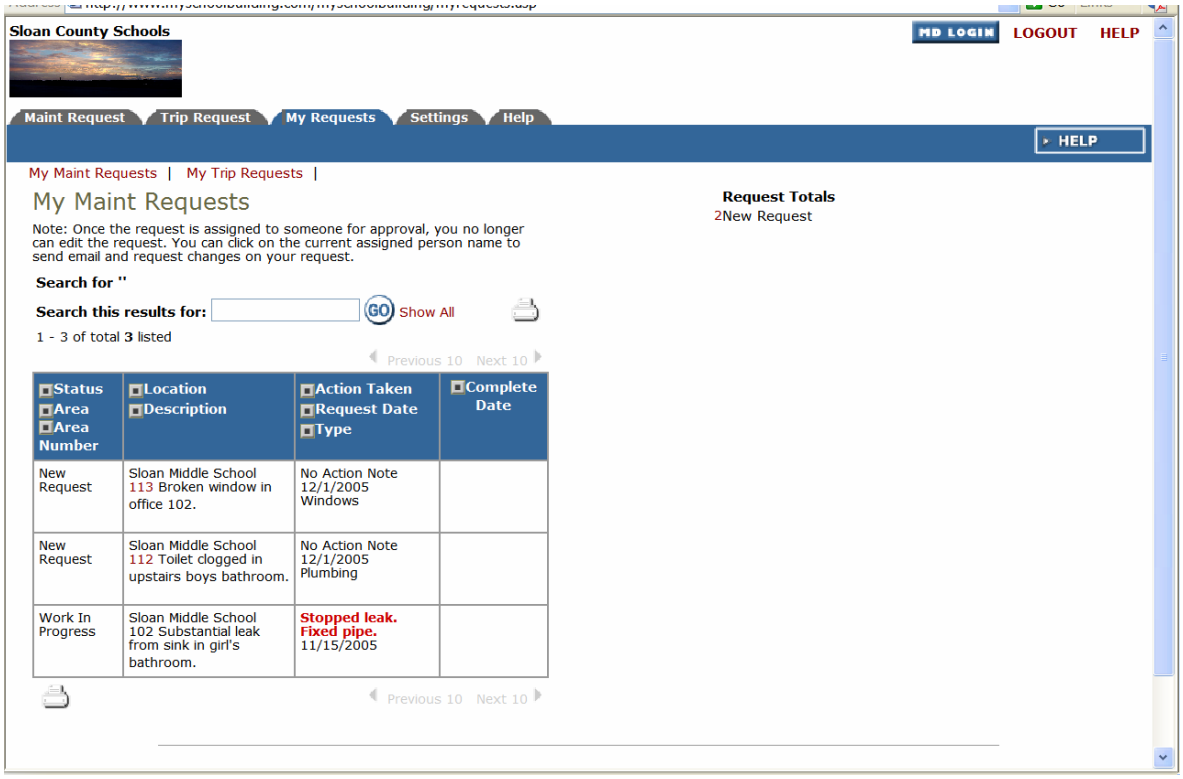
- Enter your submittal password. This password will be the same for all Requesters.

- Click Submit.

    - You will then be taken to the **My Maint Requests** page, which will show listed among other requests, the new work request you just made. We will cover this page in more detail in the next section.

V. My Requests: Keeping Track of Your Requests.

The **My Requests** page allows gives you a look at all the work requests you've made in MaintenanceDirect. You can reach the **My Requests** page by clicking on the tab at the top of the **Home** page. It should look something like this, depending on how many requests you've submitted:



- Each request you make will be added to this list, where you can check its current status, who it's been routed to, the date you submitted it, and any Action notes that have been made.

- You can print your requests using the Print icon near the bottom left-hand corner of the page:

- To search your requests, enter a key term in the **Search** field, located just above your request list, then click Go. To show all requests (after searching for work orders), click the Show All link.

- To view only requests of a certain status, click the number next to the status under the "Request Totals' section (near the top, right-hand corner).

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Administrator Guidelines

Version 2.0

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Administrator Table of Contents:

I. Administrator Guidelines 1

I. Welcome to the Home Page! Now What? 1

II. Account Setup 5

- Getting Started 6
- Account Information 7
- Budgets 9
- Locations 11
- Buildings 15
- Areas 17
- Crafts 19
- Users 21
- Role Setup 26
- Routing 28
- Manage Email Notifications 42
- MySchoolBuilding.com Setup 43
- Purpose (Purpose Codes) 46
- Projects (Project Codes) 48
- Equipment 50
- Classifications 53
- Types 55
- Custom Category 57
- Suppliers 59
- Manufacturers 62
- Copy Schema 64
- Labor Types 65
- Reporting Assignments 67
- Priority 68

III. Entering Work Orders 69

IV. Entering Labor and Purchase Transactions 74

V. Processing and Assigning New Requests 82

VI. Searching for Work Orders 86

VII. Completing/Closing Work Orders 92

VIII. Using the Calendar 95

IX. Reports 104

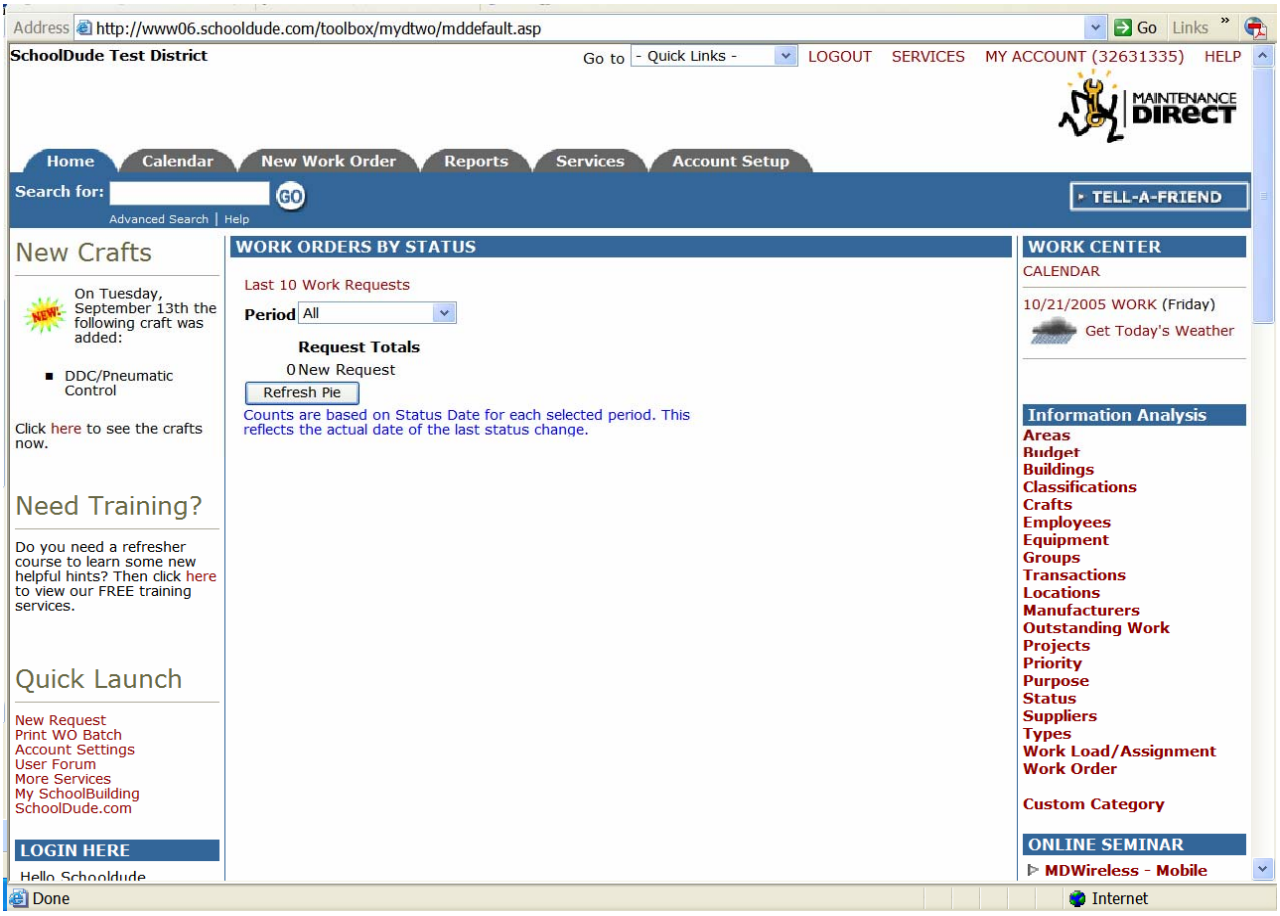
X. MaintenanceDirect Wireless 116

Administrator Guidelines

I. Welcome to the Home Page! Now What?

(A quick overview of what's on the Home page.)

Once you've logged in with your user name and password, you're taken directly to your **Home** page. It should look something like this:



Across the top of the page, there are six tabs reading: "**Home**", "**Calendar**", "**New Work Order**", "**Reports**", "**Services**", and "**Account Setup**". Each of these tabs will be discussed in detail further on but for now, let's take a look at the **Home** page. It contains the following:

1. **New Crafts**: The craft list in MaintenanceDirect is a predefined list. When you add new crafts to the system, they will show up in this section.

2. SPECIAL NOTICE: This section will show near the top, left-hand side of the **Home** page if there is SchoolDude news or announcements that we need to make you aware of, like holiday closings

3. Quick Launch: This section provides commonly used links including **New Request**, **Print Work Order Batch**, **Account Settings**, **User Forum** (a place to submit questions and/or problems you encounter while using MaintenanceDirect. You can also read questions others have posted.), and **More Services** (tells you what services are included in your annual MaintenanceDirect fee as well as optional services available and services not included), as well as links to **MySchoolBuilding.com** and **SchoolDude.com**.

4. **LOGIN HERE** : If you are logged in, you should see your name here. If you do not see your name, click the word "yourself" to log in correctly.

5. **WORK ORDERS BY STATUS** : The graph that will appear in this section as soon as the first work order is submitted will show the number of work orders by status for the entire educational facility or district.

6. **ASSIGNED WORK** : Near the bottom of the **Home** page, you will find the **Assigned Work** section, where all work orders assigned to you will display. From this section, you can print the work orders, reassign the work, add action taken, or mark it as complete.

7. **WORK CENTER**: The **Work Center** provides links to the monthly calendar as well as today's work. There is also a link to get today's weather in this section as well. The total number of assigned work orders is displayed here, along with the total number of assigned PreventiveMaintenanceDirect work orders (if you are a PreventiveMaintenanceDirect client).

8. NJAC 6:24 : If you are a New Jersey client, you will have this section on your Home page, which provides links to your M1 and M2 reports.

9. **Information Analysis** : This is your go-to section for "getting it done". It provides important links for all the major components of work order management: **Areas**, **Budget**, **Buildings**, **Classifications**, **Crafts**, **Employees**, **Equipment**, **Groups**, **Transactions**, **Locations**, **Manufacturers**, **Outstanding Work**, **Projects**, **Priority**, **Purpose**, **Status**, **Suppliers**, **Types**, **Work Load/Assignment**, and **Work Order**.

10. **ONLINE SEMINAR** : This section displays all of the upcoming seminars that SchoolDude will be conducting, along with any online product demonstrations scheduled.

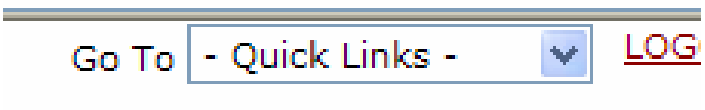
11. Need Training?: If you'd like to take a refresher course or would like to learn some new helpful hints, then click in this section on the word "here" to view our free training services.

12. Help : links are available in both the top and bottom right-hand corners of your **Home** page. Clicking on the Help link in the top right-hand corner will take you to the MaintenanceDirect manual at any time.
If you need to communicate directly with SchoolDude Support, however, go to the two links in the bottom right-hand corner of your Home page. To connect directly with someone from SchoolDude Support via Instant Messenger, click on the word "here" (underlined and highlighted in red). See below:

To write and send an email directly to SchoolDude Support, simply click on the Email icon directly below the link we just mentioned. The Email link looks like this:

A blank email form will pop up, already addressed and ready to use.

13. The Quick Links provide you with a way to navigate quickly between SchoolDude products. In other words, if you would like to move from MaintenanceDirect to another product used by your school for whatever reason, all you have to do is click on the Quick Links drop-down box, choose the SchoolDude product you'd like to visit, and you'll be taken to that product's **Home** page automatically. Quick Links is located at the top of the Home page, near the right-hand corner, and looks like this:



"Extras":

14. Related Articles: This section just includes an article or two that you may want to check out if you're interested.

15. **Did you know?** : Just a bit of interesting trivia we thought we'd share each day.

SCHOOLDUDE SAYS: Macromedia Flash Player (a free download) is required to view the pie graph on the **Home** page, as well as other graphs throughout MaintenanceDirect.

II. Account Setup: Tell Us All About Yourself!

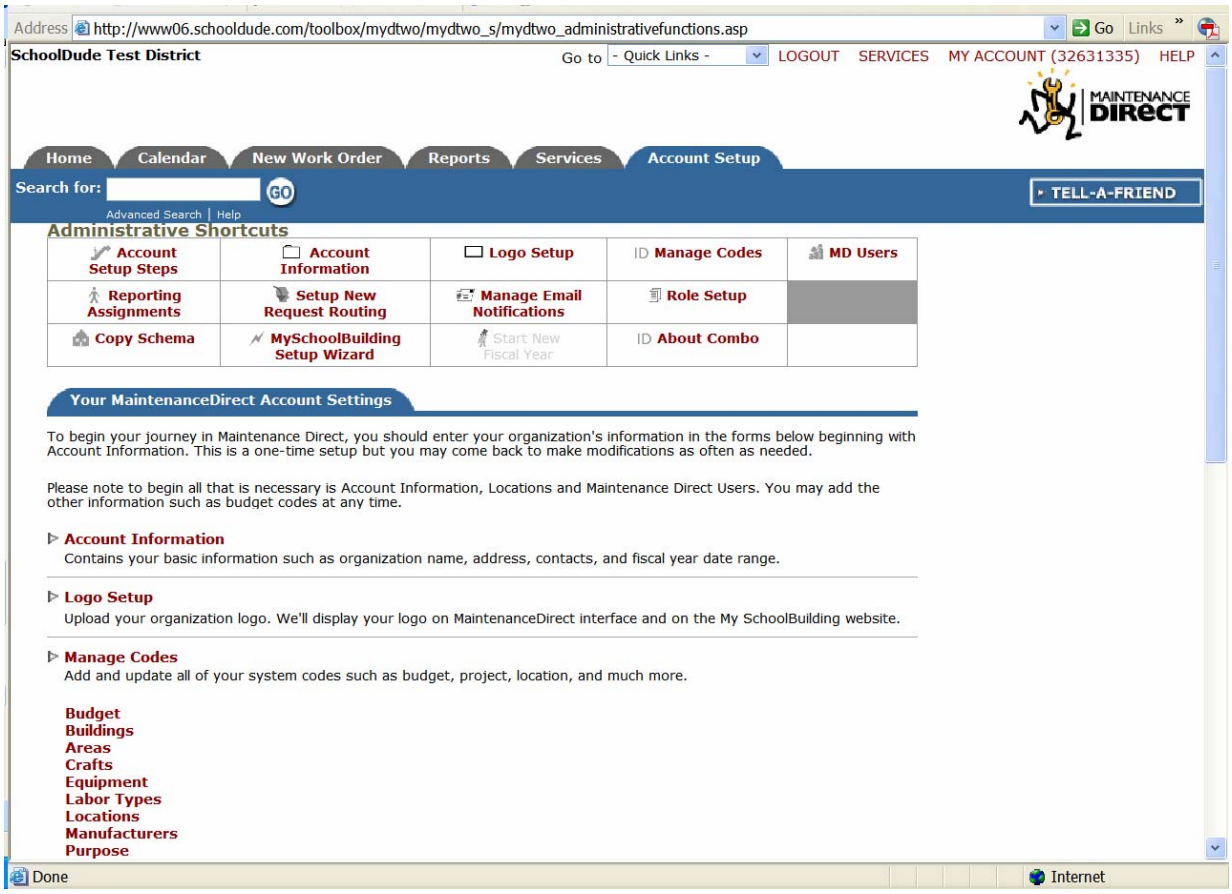
The first thing you will need to do as Administrator upon logging in for the first time is to set up all of your account information so that all options and fields will be filled in and available for anyone trying to request a trip.

Below are the steps that you'll need to follow **in the order that will assure that the information you need is there when you need it**. Keep in mind that fields marked with a ☑, both in the system and in this manual, are required fields and we will cover those first.

SCHOOLDUDE SAYS: Before you get started, just a note to you about the "Manage Codes" section of Account Setup. All of the codes used throughout MaintenanceDirect are nothing more than available information fields for work orders to make them as clear and useful to your facility as possible. Simply put, Manage Codes is just a way to customize whatever information you would like to include on your work orders.

If there is a code or category that you think should be on all of your work orders but it isn't listed under the Manage Codes section, you can create your own Code using the "Custom Category" option provided in the Manage Codes list.

1. **Getting Started**: Click on the Account Setup tab at the top of the **Home** page. The **Account Setup** page should look like this:



2. ☑ **Account Information:** Click on the Account Information link and fill in information regarding **Organization**, **Fiscal Year**, **Date Ranges**, and **Miscellaneous** preferences.

- **Maintenance Department Name**
- **Address, City, State/Province, Zip Code, Country:** Enter your complete address here. This is the address that will appear on all of your invoices. Your **Time Zone** and **Current Server Date/Time** should appear automatically, based on your address information.
- **Last Assigned Work Order Number**: This number should already be showing as 99. This is so that your work orders will start with the number 100. You can change this number if you wish; however, **you CAN'T change it to anything below** 100.
- **Maintenance Emergency Phone, Pager, and Contact (Name)**: Enter your emergency contact information here. This information will be displayed to your requesters on MySchoolBuilding.com.
- **Current Period**: Define the beginning and ending dates of your fiscal year.
- **Your Work Order Custom Category Label**: Define the label for your custom category here. Custom category is available to track any custom information.
- **PM Purpose Code:** If you have PMDirect, define your PM purpose code. This will generally be "Preventive Maintenance". Any work orders with the purpose defined here will be displayed as a PM work order and will have a yellow background.
- **FS Purpose Code:** If you have FSDirect, define your FS purpose code. This will generally be "Facility Scheduling" or something similar. Any work orders with the purpose defined here will be displayed as a FS work order and will have a blue background.
- **Use NJAC 6:24:** If you are a New Jersey client, check this box. If you are not a New Jersey client, make sure this box is un-checked. Checking this box will give New Jersey clients access to the M1 and M2 reports.
- **Sales Tax Rate:** Enter the sales tax rate here. This field should be left blank if rate calculation is not preferred on the purchase transaction form.

- **Work Order Form:** Select which work order form you'd like to use by choosing from the options in the drop-down box. Options can be previewed by clicking the "Preview" link.

- **Print Work Order Form:** Choose HTML or Adobe. If you would like for a **bar code** to be printed on the work order form, click the check box. The bar code allows for a work order to simply be scanned into the system.

- **Default Estimated Start Date to Today's Date?**: This will input today's date in the Target Start Date field of the work order form. Un-check this box if not.

- Click the Update Information button to save changes.

SCHOOLDUDE SAYS: The comptroller serves as the "safety net" of work order routing. Any work order the system doesn't know how to route gets sent to the comptroller. Also, if no service provider support is set up for a task, the task gets assigned to the comptroller.

3. Budgets: If you would like to keep track of budgeting and project-related costs (optional), enter your budget information here. A Budget option will show up in the next step of your Account Setup process (Locations), so in order to have it available then, it should be set up now. You can have a different budget for each location or for each project. Organize your budgets in the way that works best for you.

To get started, click the Budget link on the **Account Setup** page.

- On the **My Budget Codes** page, click the Add New Budget Code link.
- Under "**Add/Update Budget Code**", enter a code for the budget.
- In the "**Description**" field, give the budget a self-explanatory name or give a brief description of what the budget is for.
- Enter any Fiscal Year Budget Monies and any notes you wish to include.
- Click Submit.

SCHOOLDUDE SAYS: Keep in mind that the Budget window will display the budget's code and description. You will have room for about 30 characters.

When the page refreshes, you will be taken back to the **My Budget Codes** page where you will see the new budget has been added at the bottom of the list. Initially, it will show with a yellow thumbs-up ( ) next to it, which indicates that the budget is currently active. To deactivate the budget (and to reactivate it at any time), simply click on the thumbs-up. This will change it to a grey thumbs-down ( ), which indicates that the budget is inactive.

If you click on the name of your new fund, shown on the **My Budget Codes** page in red, you will be taken back to the **Add/Update Budget Code** page for that particular budget, where you will notice the following changes:

1. A **Budget vs. Expenses** bar graph will appear on the right-hand side of the screen, showing budgeted monies and expenses to date (fiscal).
2. **Budgeted Monies** will show at this time as well as **Expenses to Date (Fiscal)**.

- To delete or update a Budget at any time, click on the Budget name on the **My Budget Codes** page. Once on the **Add/Update Budget** page, you can either edit the budget information, clicking Save when you're finished, or you can scroll down to the bottom and click Delete to take the budget off of your list.

SCHOOLDUDE SAYS: Budgets with costs attached can **NOT** be deleted unless costs are reassigned.
Also, changes in $ amount update each night at midnight.

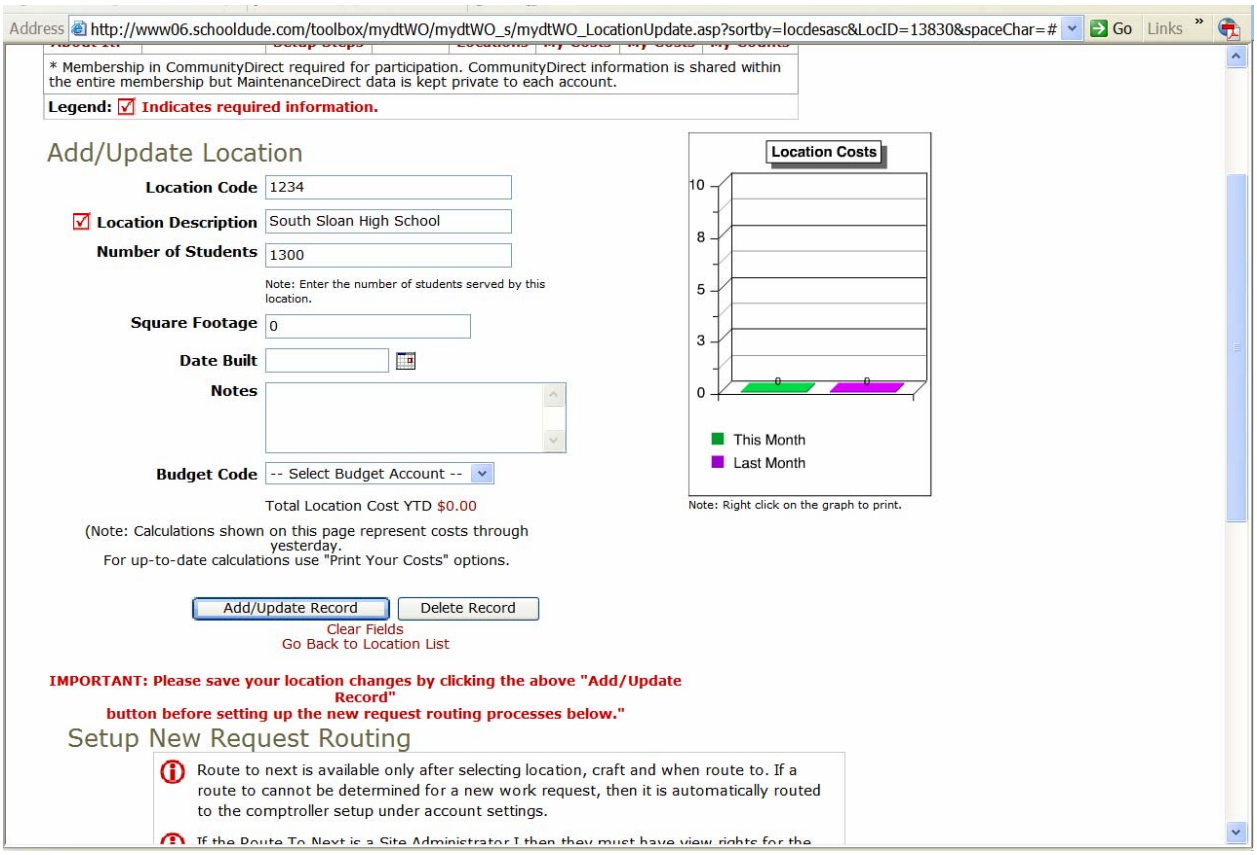
4. ☑ Locations: Locations are typically campuses in a school district. If you manage a single campus, you may want to use locations for different places on that campus. (Examples: Dude High School, West Campus)

SCHOOLDUDE SAYS: Keep in mind that **Locations** and **Buildings** are better kept separate. In other words, try to make sure you don't put your main locations under "Buildings", even if you are working with a single campus. This is largely because (besides being a little less confusing) Locations are universal throughout all of SchoolDude's products. So entering your locations into one product would automatically transfer those locations to any other SchoolDude products that you work with now or that you will work with in the future. If all of your locations are stored under "Buildings", however, those locations won't transfer.

To enter each school in your district or location on your school's campus, click on the Locations link on the **Account Setup** page and follow the steps below:

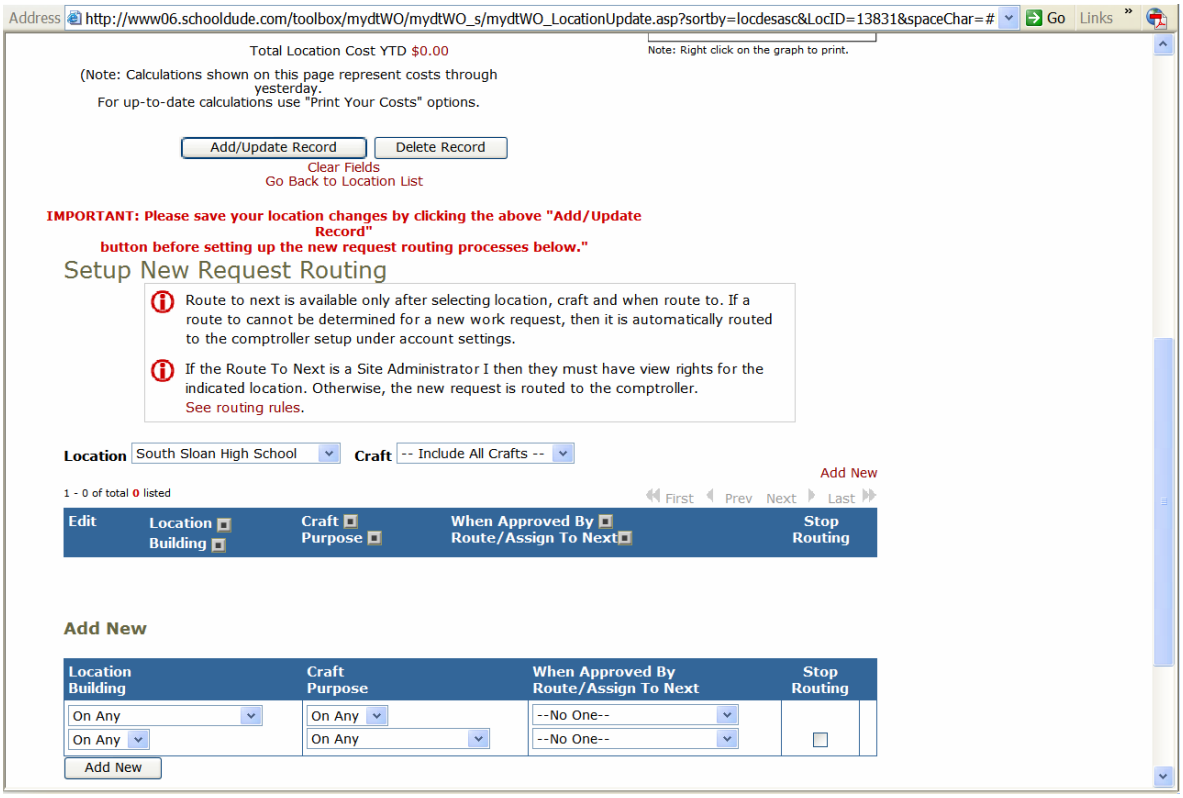
- Click the Add New Location link.
- On the **Add/Update Location** page, assign a code to your location and enter it in the **Location Code** field. (An example of a Location Code would be "THS" for "Triton High School").
- In **Description**, enter the name of the location.
- Enter any further information you have, including number of students at each location, square footage, any notes you wish to make, and budget code. Then click Add/Update Record.

You will be taken to the following page:


Address http://www06.schooldude.com/toolbox/mydtWO/mydtWO_s/mydtWO_LocationUpdate.asp?sortby=locdesasc&LocID=13830&spaceChar=#
Go
Links
* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.
Legend: Indicates required information.
Add/Update Location
Location Code 1234
Location Description South Sloan High School
Number of Students 1300
Note: Enter the number of students served by this location.
Square Footage 0
Date Built
Notes
Budget Code -- Select Budget Account --
Total Location Cost YTD $0.00
(Note: Calculations shown on this page represent costs through yesterday.
For up-to-date calculations use "Print Your Costs" options.
Add/Update Record
Delete Record
Clear Fields
Go Back to Location List
IMPORTANT: Please save your location changes by clicking the above "Add/Update Record"
button before setting up the new request routing processes below."
Setup New Request Routing
Route to next is available only after selecting location, craft and when route to. If a route to cannot be determined for a new work request, then it is automatically routed to the comptroller setup under account settings.
Location Costs
10
8
5
3
0
This Month
Last Month
Note: Right click on the graph to print.

You can make changes to your Budget information on this page now or at any time by clicking on the name of the budget on the **My Budget Codes** page. The Location Costs section to the right is a graph that will show costs for this location for This Month in green and Last Month in purple.

Near the bottom of the page, you will notice a section that looks like this:


Address http://www06.schooldude.com/toolbox/mydtWO/mydtWO_s/mydtWO_LocationUpdate.asp?sortby=locdesasc&LocID=13831&spaceChar=#
Go
Links
Total Location Cost YTD $0.00
Note: Right click on the graph to print.
(Note: Calculations shown on this page represent costs through yesterday.
For up-to-date calculations use "Print Your Costs" options.
Add/Update Record
Delete Record
Clear Fields
Go Back to Location List
IMPORTANT: Please save your location changes by clicking the above "Add/Update Record"
button before setting up the new request routing processes below."
Setup New Request Routing
Route to next is available only after selecting location, craft and when route to. If a route to cannot be determined for a new work request, then it is automatically routed to the comptroller setup under account settings.
If the Route To Next is a Site Administrator I then they must have view rights for the indicated location. Otherwise, the new request is routed to the comptroller.
See routing rules.
Location South Sloan High School
Craft -- Include All Crafts --
Add New
1 - 0 of total 0 listed
First Prev Next Last
Edit
Location Building
Craft Purpose
When Approved By Route/Assign To Next
Stop Routing
Add New
Location Building
Craft Purpose
When Approved By Route/Assign To Next
Stop Routing
On Any
On Any
On Any
On Any
--No One--
--No One--
Add New

SCHOOLDUDE SAYS: The **Setup New Request Routing** section near the bottom of the page will be useful for quick setup of new locations later on but for now, we recommend waiting to set up New Request Routing during the step-by-step process of the Account Setup (further along in this manual) so that you can better see how information is entered and where it will consequently show up within the system later. In other words, as a new user of MaintenanceDirect, following the regular Account Setup format will help you get a better understanding of how the product works.

- Your Location information has been saved. To see the new Location listed, return to the **My Locations** page by clicking the Go Back to Locations List link in red, just beneath the "Add/Update Record" and "Delete Record" buttons or by clicking the My Locations shortcut at the top of the page.

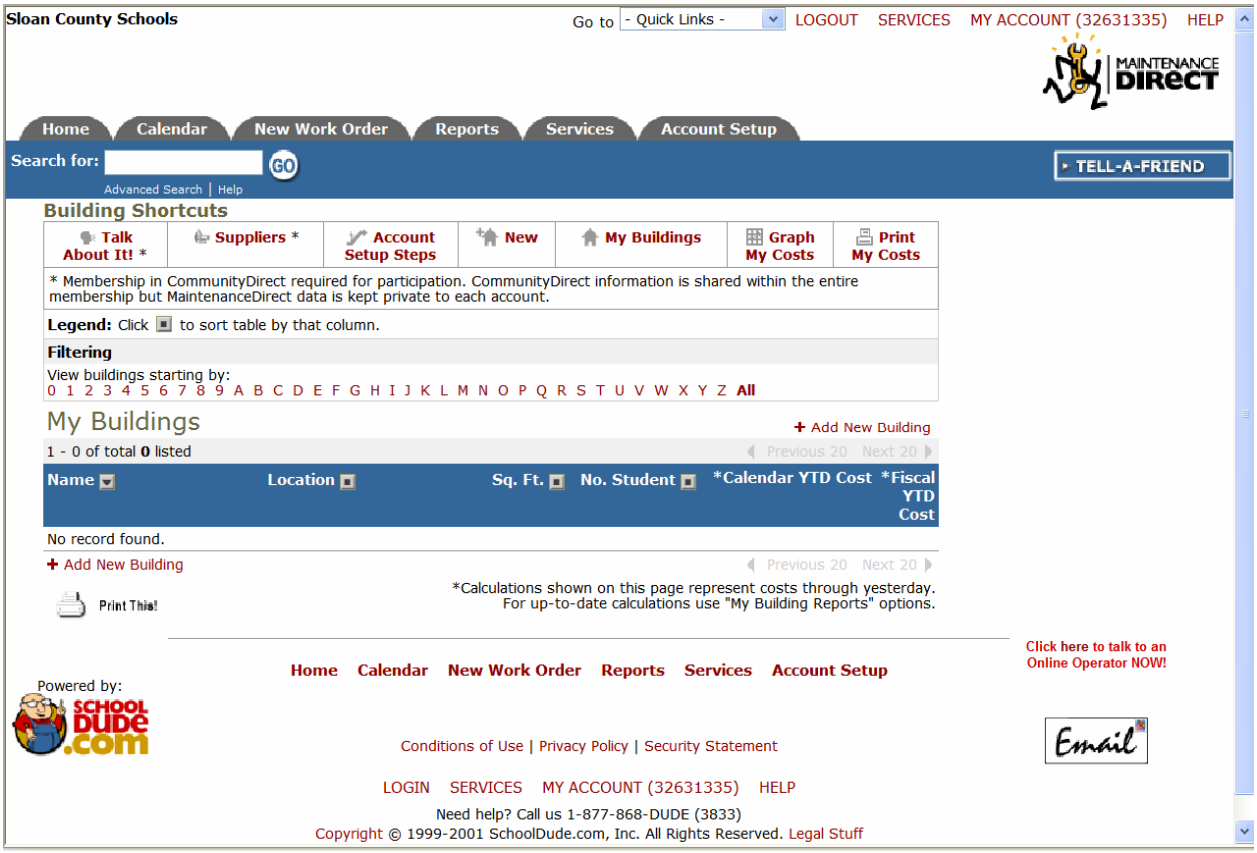
- To continue adding locations, click the Add New Location shortcut and repeat above steps. You can see the information you've entered by clicking on the List My Locations shortcut.

- To delete a Location, click on the Locations link from the **Account Setup** page. Click on the name of the location on the **My Locations** page, scroll to the bottom of the **Add/Update Location** page, and click Delete. Confirm by clicking OK in the box that will pop up and you will immediately be taken back to the **My Locations** page which will show that the location has been deleted.

SCHOOLDUDE SAYS: You will not be able to delete a location once costs have been assigned to it.

5. Buildings: This section is optional, but if you have multiple free-standing structures on a campus, you might list these as buildings for a particular location. (Examples: Dude Hall, Smith Performing Arts Center, etc.) Try to avoid using smaller structures like field houses, pump houses, or modular units as Buildings.

The **My Buildings** page can be reached by clicking on the Buildings link on the **Account Setup** page. It should look something like this:


Sloan County Schools
Go to - Quick Links -
LOGOUT
SERVICES
MY ACCOUNT (32631335)
HELP
MAINTENANCE DIRECT
Home
Calendar
New Work Order
Reports
Services
Account Setup
Search for:
GO
Advanced Search | Help
TELL-A-FRIEND
Building Shortcuts
Talk About It! *
Suppliers *
Account Setup Steps
New
My Buildings
Graph My Costs
Print My Costs
* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.
Legend: Click to sort table by that column.
Filtering
View buildings starting by:
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All
My Buildings
+ Add New Building
1 - 0 of total 0 listed
Previous 20 Next 20
Name
Location
Sq. Ft.
No. Student
*Calendar YTD Cost
*Fiscal YTD Cost
No record found.
+ Add New Building
Previous 20 Next 20
Print This!
*Calculations shown on this page represent costs through yesterday.
For up-to-date calculations use "My Building Reports" options.
Click here to talk to an Online Operator NOW!
Home Calendar New Work Order Reports Services Account Setup
Powered by:
SCHOOL DUDE .com
Email
Conditions of Use | Privacy Policy | Security Statement
LOGIN SERVICES MY ACCOUNT (32631335) HELP
Need help? Call us 1-877-868-DUDE (3833)
Copyright © 1999-2001 SchoolDude.com, Inc. All Rights Reserved. Legal Stuff

Get started adding Buildings by following these steps:

- Click the +Add New Building link.
- Select the Location of the building from the drop-down box provided.
- Enter the Name of the building.
- Include square footage and number of students served, if desired.
- Click Save.

You will then be taken back to the **My Buildings** page which will show the new building that you just entered. Continue adding Buildings by clicking the +Add New Building link and repeating the steps above.

- To edit/update information for a particular building, simply click on that building's name on the **My Buildings** page, make the changes that you wish to make on the **Add/Update Building** page, and click Save.

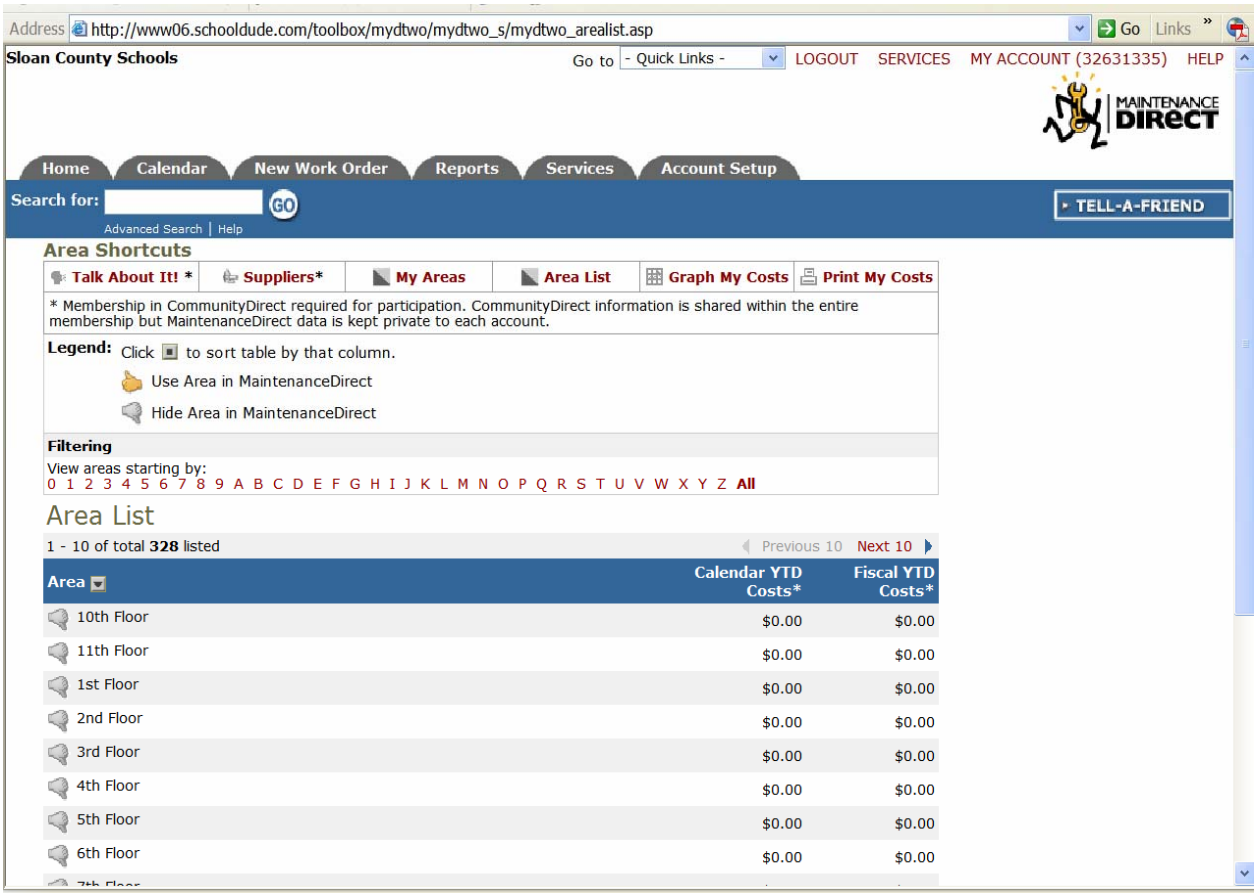
- To Delete a building, simply click on the name of that building on the **My Buildings** page. Once on the **Add/Update Building** page, click the Delete button near the bottom. The building will then be deleted.

SCHOOLDUDE SAYS: You will not be able to delete a building once costs have been assigned to it.

6. Areas: Areas are predefined and listed in MaintenanceDirect for your use. Some examples of these Areas are: "1st Floor", "Auditorium", and "Classroom". Areas, though optional, are another way to clarify reports by narrowing criteria.

To set up Areas, simply follow these steps:

- From the **Account Setup** page, click on the Areas link. The page you are taken should look like this:


Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_arealist.asp
Go Links
Sloan County Schools
Go to - Quick Links - LOGOUT SERVICES MY ACCOUNT (32631335) HELP
MAINTENANCE DIRECT
Home Calendar New Work Order Reports Services Account Setup
Search for: GO
Advanced Search | Help
TELL-A-FRIEND
Area Shortcuts
Talk About It! * Suppliers* My Areas Area List Graph My Costs Print My Costs
* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.
Legend: Click to sort table by that column.
Use Area in MaintenanceDirect
Hide Area in MaintenanceDirect
Filtering
View areas starting by:
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All
Area List
1 - 10 of total 328 listed
Previous 10 Next 10
Area
Calendar YTD Costs*
Fiscal YTD Costs*
10th Floor $0.00 $0.00
11th Floor $0.00 $0.00
1st Floor $0.00 $0.00
2nd Floor $0.00 $0.00
3rd Floor $0.00 $0.00
4th Floor $0.00 $0.00
5th Floor $0.00 $0.00
6th Floor $0.00 $0.00

- Begin activating Areas by scrolling through the list of Areas given and clicking on the grey thumbs-down ( ) to change it to a yellow thumbs-up ( ), which indicates that the Area is then active.

SCHOOLDUDE SAYS: To speed up this process, click on the My Areas shortcut at the top of the page:

This will take you to a long list of all the Areas that you can simply scroll down and activate, rather than switching from page to page with every ten Areas (there are currently more than 300!).

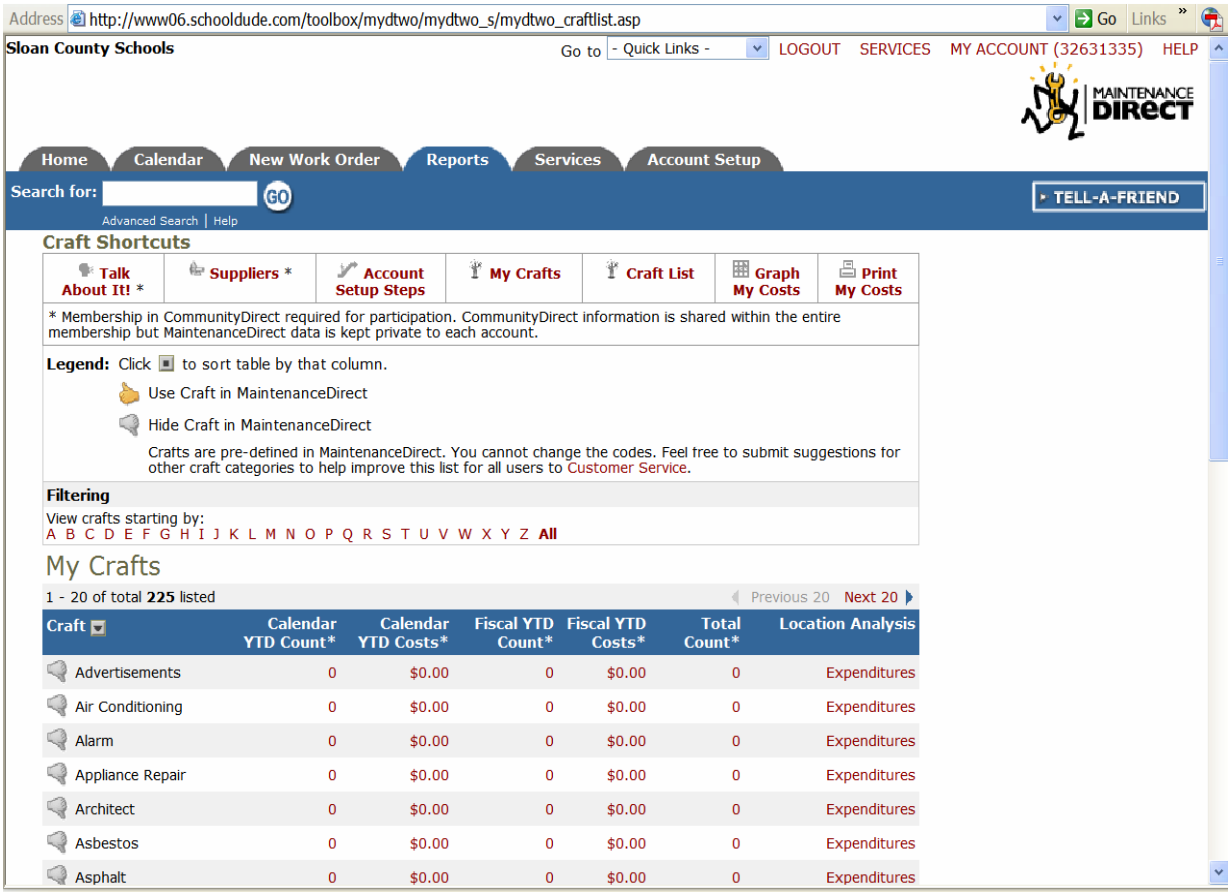
Also, try starting out with the smallest number of Areas activated as possible to limit the confusion of your new users when they fill out a form. You can always activate more areas later.

7. Crafts: Crafts are generic skills needed to fix a problem. MaintenanceDirect has over 200 crafts to choose from. Crafts help you organize your work and assign it to the appropriate people. Think of crafts as another way of saying "trade code" or "problem type".

To set up Crafts, simply follow these steps:

- From the **Account Setup** page, click on the Crafts link.

The page you are taken to should look like this:


Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_craftlist.asp
Go Links
Sloan County Schools
Go to - Quick Links - LOGOUT SERVICES MY ACCOUNT (32631335) HELP
MAINTENANCE DIRECT
Home Calendar New Work Order Reports Services Account Setup
Search for: GO
Advanced Search | Help
TELL-A-FRIEND
Craft Shortcuts
Talk About It! * Suppliers * Account Setup Steps My Crafts Craft List Graph My Costs Print My Costs
* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.
Legend: Click to sort table by that column.
Use Craft in MaintenanceDirect
Hide Craft in MaintenanceDirect
Crafts are pre-defined in MaintenanceDirect. You cannot change the codes. Feel free to submit suggestions for other craft categories to help improve this list for all users to Customer Service.
Filtering
View crafts starting by:
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All
My Crafts
1 - 20 of total 225 listed
Previous 20 Next 20
Craft | Calendar YTD Count* | Calendar YTD Costs* | Fiscal YTD Count* | Fiscal YTD Costs* | Total Count* | Location Analysis
Advertisements 0 $0.00 0 $0.00 0 Expenditures
Air Conditioning 0 $0.00 0 $0.00 0 Expenditures
Alarm 0 $0.00 0 $0.00 0 Expenditures
Appliance Repair 0 $0.00 0 $0.00 0 Expenditures
Architect 0 $0.00 0 $0.00 0 Expenditures
Asbestos 0 $0.00 0 $0.00 0 Expenditures
Asphalt 0 $0.00 0 $0.00 0 Expenditures

- Begin activating Crafts by scrolling through the list of Crafts given and clicking on the grey thumbs-down ( ) to change it to a yellow thumbs-up ( ), which indicates that the Craft is then active.

SCHOOLDUDE SAYS: To speed up this process, click on the My Crafts shortcut at the top of the page:

This will take you to a long list of all the Crafts that you can simply scroll down and activate, rather than switching from page to page with every twenty Crafts (there are currently more than 200!).

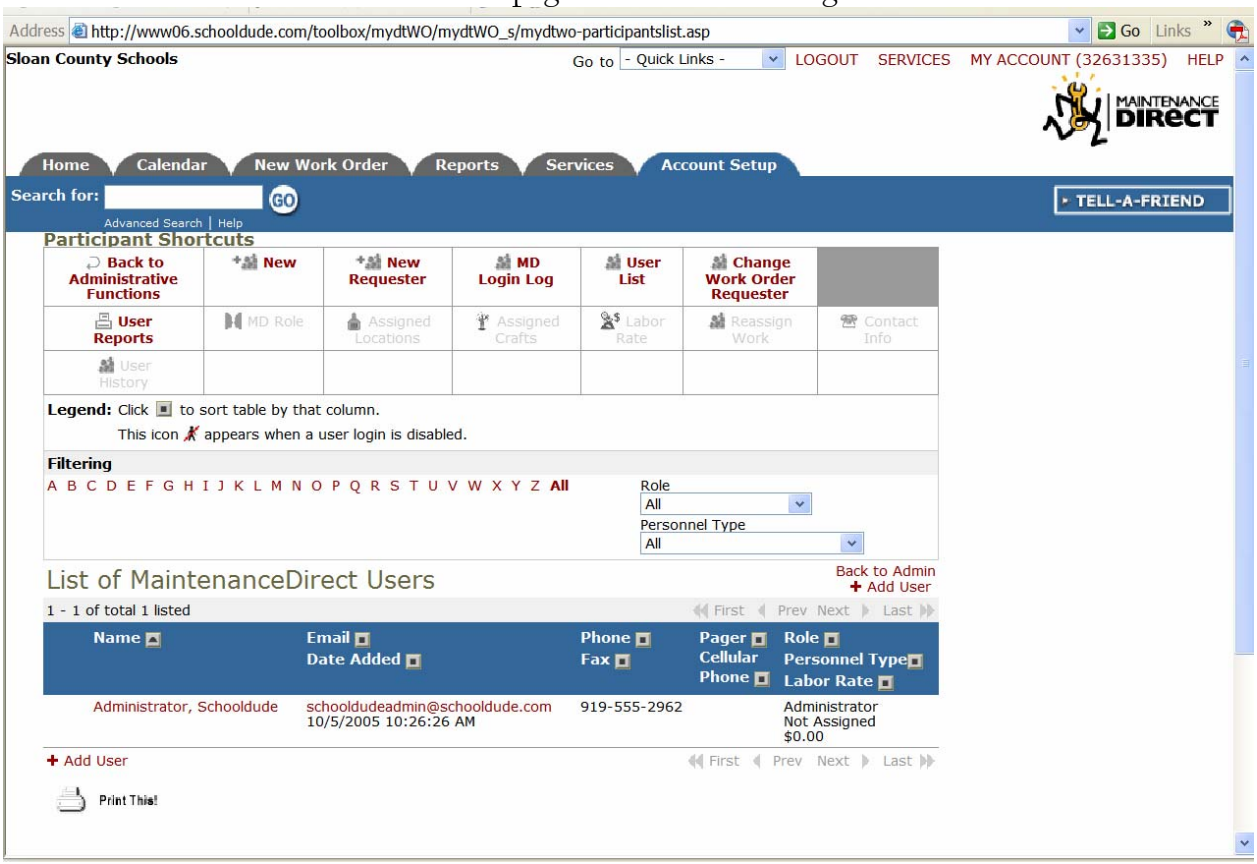
Again, try starting out with the smallest number of Crafts activated as possible to limit the confusion of your new users when they fill out a form. You can always activate more crafts later.

8. ☑ Users: This is where you will identify all MaintenanceDirect and MySchoolBuilding.com users, their roles, crafts, and location responsibilities. You will also create a username and password for each user. Click on the Users link on the **Account Setup** page to get started.

SCHOOLDUDE SAYS: We suggest that you wait to add new Requesters during the setup of MySchoolBuilding.com, which will come later in the Account Setup section of this manual. This is because when you come to the step of choosing the new user's personnel type in this section, the choices of "teacher", "principal" or "department head" aren't given. It will be a little less confusing to wait until later to enter users with these roles. For now, just use this step to enter your technicians, supervisors, administrators, etc. Requesters have the ability to add themselves to the user list. To see how, refer to the Requester section of this manual.

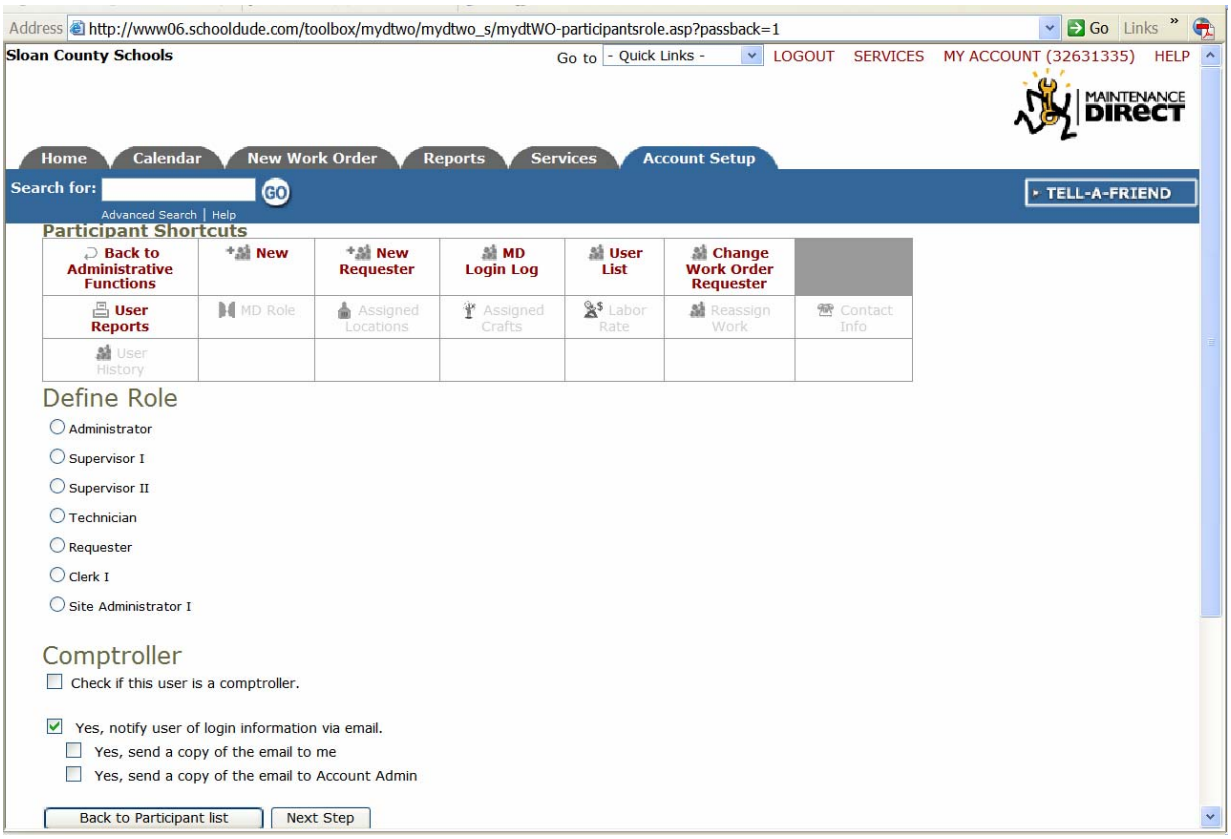
- Click the New link under Participant Shortcuts or the +Add User links on the far right-hand side of the screen just below the words "List of MaintenanceDirect Users" or on the left-hand side of the screen just below where the users will be listed.

The **List of MaintenanceDirect Users** page will look something like this:



- You will be taken to a page that will allow you to either choose from a drop-down box of registered users already entered into the SchoolDude system or to add a completely new user.

- To add a new user to MaintenanceDirect, click the New User button. You will be taken to the following page:



Follow these steps:

- Choose which role the new user will have.

- If this person will be the comptroller of your account, indicate so here by clicking in the check box provided. ***Note that there can only be one comptroller***.

- If you would like for the new user to be informed of their login information via email, leave the check box provided checked. If not, click on the box to remove the green check mark. If you would like to have a copy of the email sent to you and/or the Account Administrator (if someone in addition to you), indicate this by clicking in the check boxes provided.

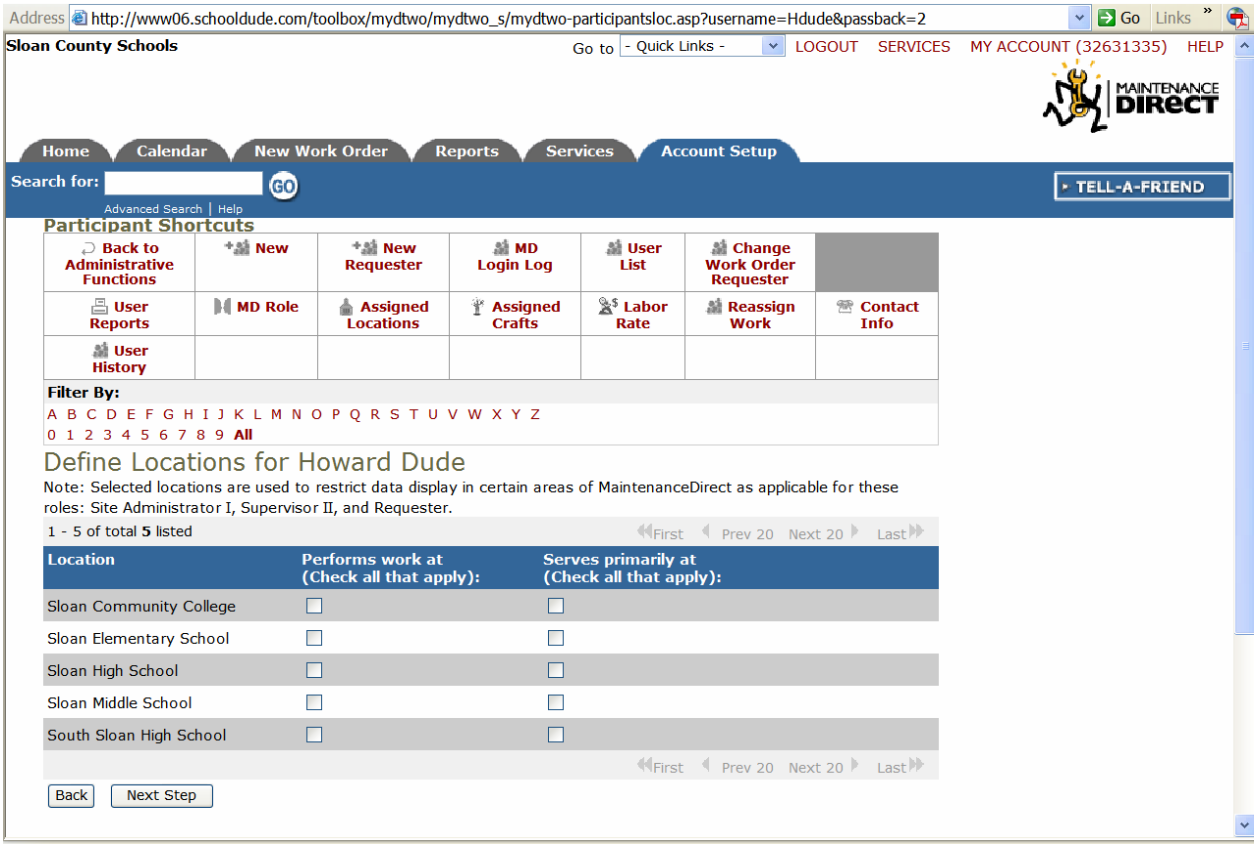
- Click Next Step.

Continue on the next page with the following steps:

- ☑ Create a Login Name for the new user.
- ☑ Create a password for the new user. Choose a password that will be easy for them to remember and at least six characters long. If you use the password "newuser", they will be asked to change their password when they log in for the first time.
- ☑ Enter the First Name, Last Name, and Email address of the new user.
- If you would like for this user to receive email notifications, leave the check box provided checked. If not, click on the check box to remove the green check mark.
- Select who this user will report to from the drop-down box provided. This is only necessary if you are setting up a technician to report to a supervisor.
- Choose the personnel type of the new user from the list in the drop-down box provided. This serves informational purposes only and has no effect on the functionality of that user.
- Enter the user's phone, fax, and pager number, if available.
- If you would like for this user to receive notifications via pager, click in the check box provided.
- If you would like for this user to receive emails via pager only for emergency work orders, click in the check box provided.
- If you would like for this user to be notified electronically by cell phone, click in the check box provided.
- If you would like for this user to receive notifications via cell phone only for emergency work orders, click in the check box provided.
- If you would like to disable this user's login at any time, click on the check box provided here. Enter the effective date next, if applicable.
- Enter the user's employment and termination dates next, as well as any notes you wish to include.
- Click Next Step.

SCHOOLDUDE SAYS: If you receive a message stating that the Login Name already exists, you may have created a name that is already being used by another SchoolDude client. Try changing the login name and submitting it again.

The next page you are taken to will look something like this:


Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo-participantsloc.asp?username=Hdude&passback=2
Sloan County Schools
Go to - Quick Links -
LOGOUT SERVICES MY ACCOUNT (32631335) HELP
MAINTENANCE DIRECT
Home Calendar New Work Order Reports Services Account Setup
Search for:
GO
Advanced Search | Help
TELL-A-FRIEND
Participant Shortcuts
Back to Administrative Functions
New
New Requester
MD Login Log
User List
Change Work Order Requester
User Reports
MD Role
Assigned Locations
Assigned Crafts
Labor Rate
Reassign Work
Contact Info
User History
Filter By:
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0 1 2 3 4 5 6 7 8 9 All
Define Locations for Howard Dude
Note: Selected locations are used to restrict data display in certain areas of MaintenanceDirect as applicable for these roles: Site Administrator I, Supervisor II, and Requester.
1 - 5 of total 5 listed
First Prev 20 Next 20 Last
Location
Performs work at (Check all that apply):
Serves primarily at (Check all that apply):
Sloan Community College
Sloan Elementary School
Sloan High School
Sloan Middle School
South Sloan High School
First Prev 20 Next 20 Last
Back
Next Step

- Choose which locations this user will be working from/with and to what extent by clicking the check box next to the appropriate location name in the right column of check boxes. Check all that apply. This is only necessary if you are adding a Site Administrator I or Supervisor II.

- Click Next Step.

On the next page, click which crafts this user will be working/concerned with.

- Check the box(es) in the right column of check boxes that the user has a "Working knowledge in" and/or "Skilled knowledge in". Check all that apply. This is only necessary if you are adding a Supervisor II.

- Click Next Step.

The next page allows you to define the labor rate of the new user.

- If this applies to this particular user, choose a labor rate from the drop-down box or enter a specified rate into the box provided.
- Click Next Step.
- That's it!

SCHOOLDUDE SAYS: We suggest using an Average Labor Rate and listing that rate for all of your users with the same role or by their trade. To calculate your average labor rate, add the individual hourly rates for all you users, add the cost of benefits and then divide that by the number of workers.

You will then be taken back to the **List of MaintenanceDirect Users** page, which will show the addition of your newest user. Repeat the steps above to continue adding users.

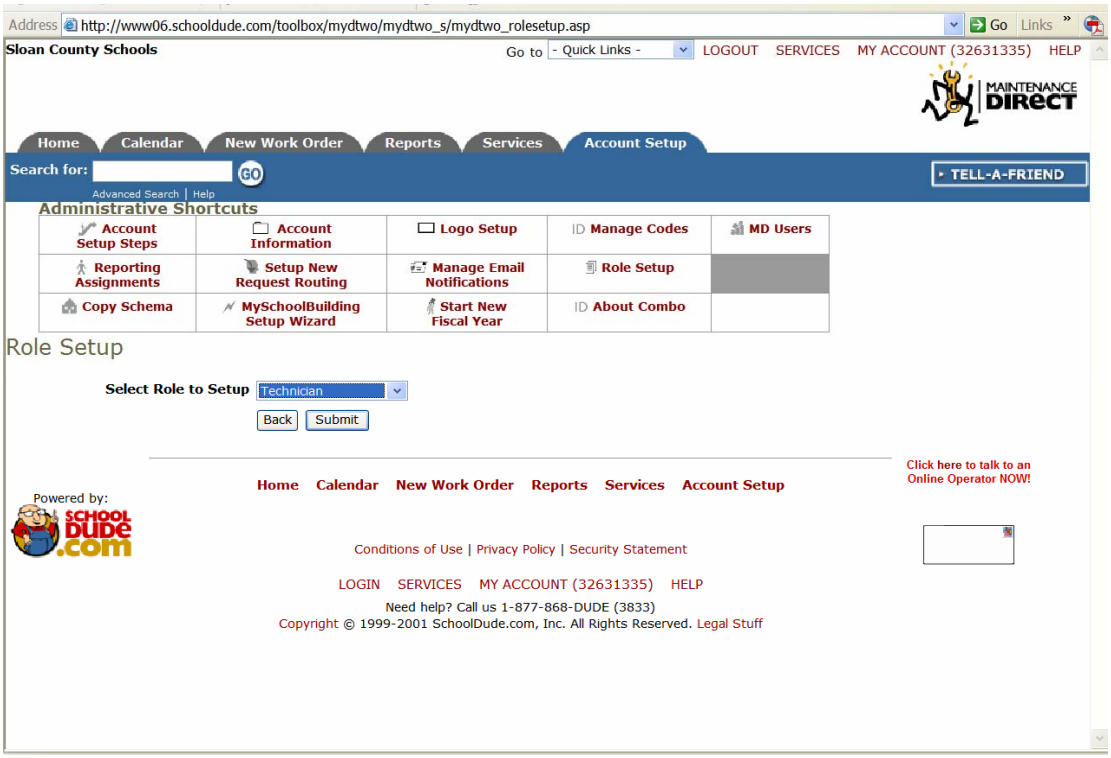
- To **view** a particular user's information, **make changes**, or **delete** a user, simply click on that user's name on the List of MaintenanceDirect Users page, make the desired changes and click Save **or** scroll down to the bottom and click Delete.
- If you wish to add a user to MaintenanceDirect that is already registered in the system, simply click the +Add User link on the **List of MaintenanceDirect Users** page, choose their name from the Registered Users drop-down box on the next page, click Add This User. From that page, follow the previous instructions as you would for a new user.

SCHOOLDUDE SAYS: You will NOT be able to delete a user once there are work orders assigned to them. However, if you need to, for example, remove a Technician from having access to MaintenanceDirect (or any other SchoolDude product), pull up their information in **Account Setup** and check the Disable Login button. This disables their access to the product but you will still be able to run reports on them. This is especially useful when attempting to delete a user that has many work orders or incidents assigned to them.

9. ☑ Role Setup: You have the ability to choose options for each role you have entered that will determine whether or not the comptroller should be notified when a new user logs in (for the roles of Administrator, Site Administrator 1). The Supervisor II and Technician roles have a few extra options you may select for all users designated to that role.

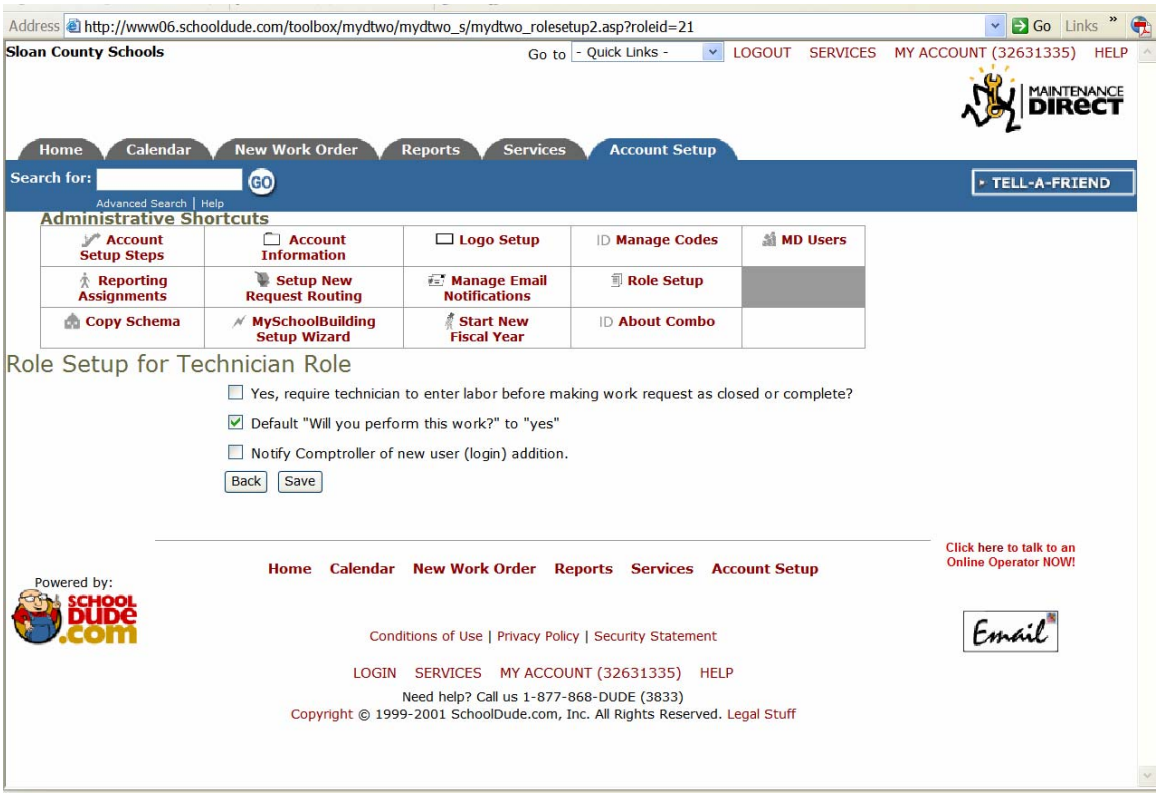
To set these options, click on the Role Setup link on the **Account Setup** page and follow the steps below:

- On the **Role Setup** page, select a User Role from the drop-down box. (In the example below, we've chosen "Technician".)



- Click Submit.

- On the next page that appears, a check box (or check boxes, depending on which role you select—each role has different options) will appear next to the available options. (See "SchoolDude Says" on the next page of this manual.) To activate the option, click on the check box and a green check will appear.



- Click Save.
- To continue setting up roles, click on the Back button after the page refreshes. You can also click on the Role Setup shortcut box at the top of the page after saving as well to continue.

SCHOOLDUDE SAYS: The Administrator, Supervisor I, Technician, Requester, and Site Administrator I all have one page of options for additional role setup. Only the Supervisor II role setup screen has two pages of optional settings.

10. Routing: At this point, if you wish to employ this option of MaintenanceDirect, you'll need to decide how your work orders will be routed. In other words, who will get a request once it is requested, who will they send it on to, etc.? As this part of the Account Setup process can sometimes seem a little confusing, this section will be a bit longer than the others as we've included more information and explanation to make it as easy to understand as possible.

A work order can have one of eleven statuses during the routing process:

1) **New Request:** All work orders are initially set to New Request. Generally, "New Request" means that they have not been assigned to someone for the work to be completed.

2) **Work in Progress:** Any work order assigned or scheduled to be completed would be considered a work in progress.

3) **Parts on Order:** This defines any work order waiting for the arrival of parts before continuing.

4) **On Hold:** Work placed on hold for any reason besides waiting for parts would be placed under the "On Hold" status.

5) **Waiting More Information:** If you are waiting for more information from the requester or another person, you would assign the status of "Waiting for Information".

6) **Open Extended:** This status applies to any work order that you want to keep open for an extended amount of time. This can be used to keep track of labor hours for a general task done daily.

7) **Pending:** All PM work orders will initially have a status of "Pending".

8) **Waiting Funding:** This work request is waiting for the money/funds to become available before the work can begin.

9) **Deferred:** This status is used to show that a work request has been approved but will be completed at a later date.

10) **Forwarded:** This status is used to show work orders that are forwarded to ITDirect. This can be done when a work request is mistakenly entered to the wrong department.

11) **Declined:** The declined status will define any work orders that will not be done. They may be declined by a principal or by a person in the maintenance department.

12) **Complete:** A complete status signifies that all the actual work has been done. All purchases and labor transactions may not be entered into the system. This will alert the requesters that the work has been done.

13) **Closed:** Once all transactions and notes are added into the work order, you would close it. Once a work order is closed, you cannot add any more transactions. (You would have to change the status back to "Complete" in order to add more transactions.

14) **Duplicate Request:** This defines any work order entered twice or previously requested.

15) **Void:** Voided work orders are work orders that you would like to remove and will not show up in any reports unless specifically requested. You cannot delete a work order so instead, you may want to void them out of the system.

It is also important to know that there are five types of work order routing that you can choose from for use at your educational facility. Those are:

1) **Comptroller Routing**: All work orders will go to one person. That one person will decide where they go from there, reassigning them to other supervisors and technicians.

2) **Approval-Based Routing:** This method works best if you want your work orders to be approved by a principal or other site administrator before they come to the maintenance department.

3) **Craft-Based Routing:** With this type of routing, work orders can be routed to go to certain users based on the craft (problem type) that was selected.

4) **Site-Based Routing:** Work orders can be routed to a certain user based on the location that was selected.

5) **Combination Craft and Site-Based Routing:** With this type of routing, work orders can go to users based on both the location and the craft that was selected in the work order.

SCHOOLDUDE SAYS: You are not limited to using only these methods of routing in MaintenanceDirect. The above methods are simply examples of our most commonly used routing types. SchoolDude routing is created to be very versatile so that you can change it up to find the way that best suits your educational facility. Feel free to be creative!

Also, keep in mind that any new requests that come in that do not fall within your routes will be routed automatically to your comptroller.

SCHOOLDUDE SAYS:

A Word (or Two) About "When Approved By Route/Assign to Next":

When Approved By Route/Assign To Next

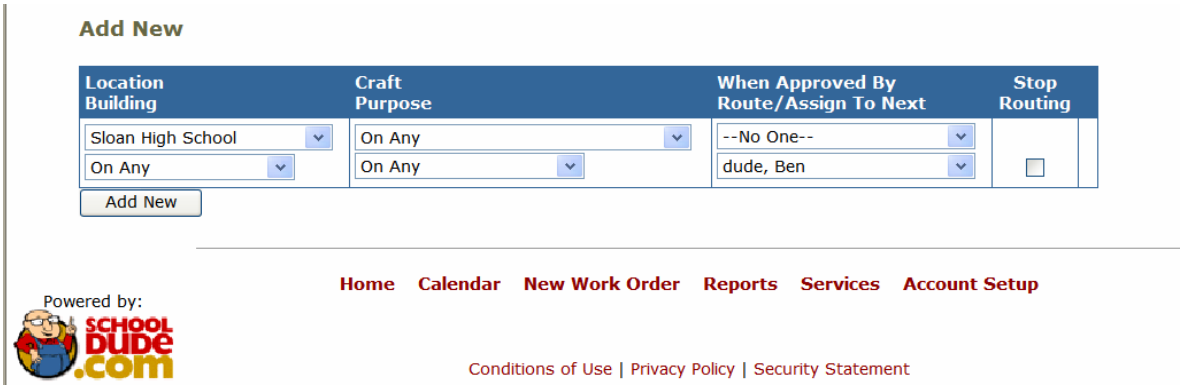
What this means is that when a work order has been routed, based on its status, to whoever you pick to go in the top drop-down box, it will then be routed next to whoever you pick to go in the bottom drop-down box.

When a requester submits a work request, its status is "New Request" and under this status, it will go to the first person designated to approve work orders (usually the Principal or another Site Administrator). Therefore, No One would go in the top box and the Principal's name would go in the bottom box. In other words, the request would go first to "No One but the Principal".

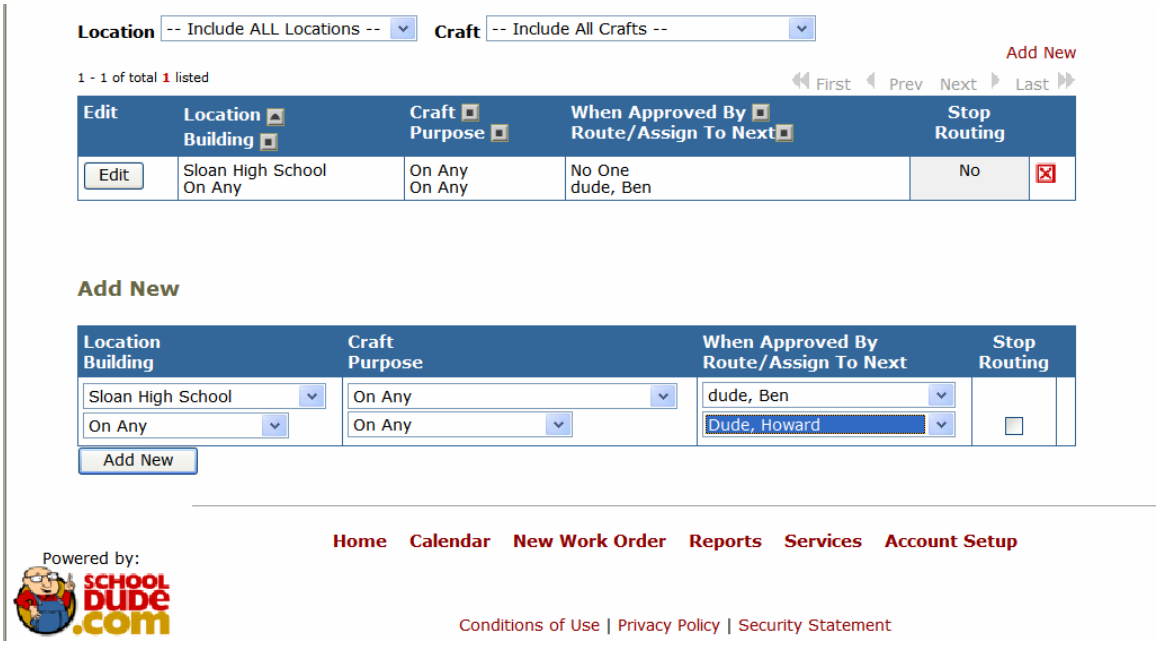
As a quick example (using Approval-based routing), let's say Tom (a coach) is the requester, Ben (the principal) is the Site Administrator 1, and Howard (in the transportation department, resource allocation, etc.) is the Technician.

Requests are routed to go first to Ben for approval and then (once approved) on to Howard for execution.

Therefore, for the "New Request" status of the request routing process, "No One" would go in the top box and "Ben" would go in the bottom box (the request would first go to "No One" but "Ben"). See below:



Second, Tom's request, if approved by Ben, would go on to Howard. So, once the request reached "Approved" status, Ben would go in the top box and Howard would go in the bottom box (the request would go on from Ben on to Howard). See below:



This was an example using the Approval-based routing method, which can be used to decide in what order the routing process will proceed when a work order must first be approved by a principal or other Site Administrator before it comes to the maintenance department. You can choose, based on the descriptions below, which form (or combination of forms) of routing will work best for your educational facility.

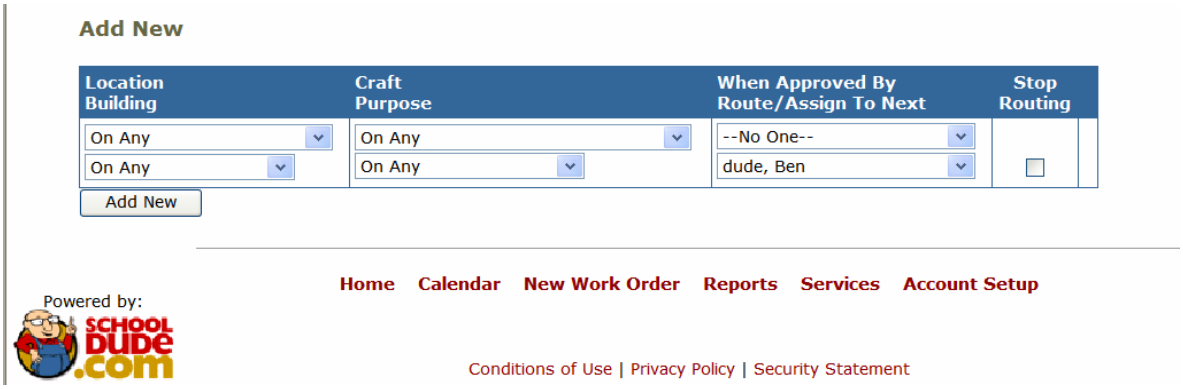
Now that you know how "When Approved By Route/Assign To Next" works, let's move on to the various methods of routing.

MaintenanceDirect Routing 101:
Which Method Will Work Best for You?

A. Comptroller-Based Routing: This is the simplest form of routing. If all of your work orders will go to one person, that person is called the "comptroller". To send all of your work orders to the comptroller, you will just need one route in your system. In this example, Ben Dude is the comptroller:

- In the Location drop-down, you would choose "On Any".
- For Craft and Purpose, you would also select "On Any".
- In the "When Approved By Route/Assign to" section, you would select "No One" from the top drop-down box and "Ben Dude" from the bottom drop-down box.

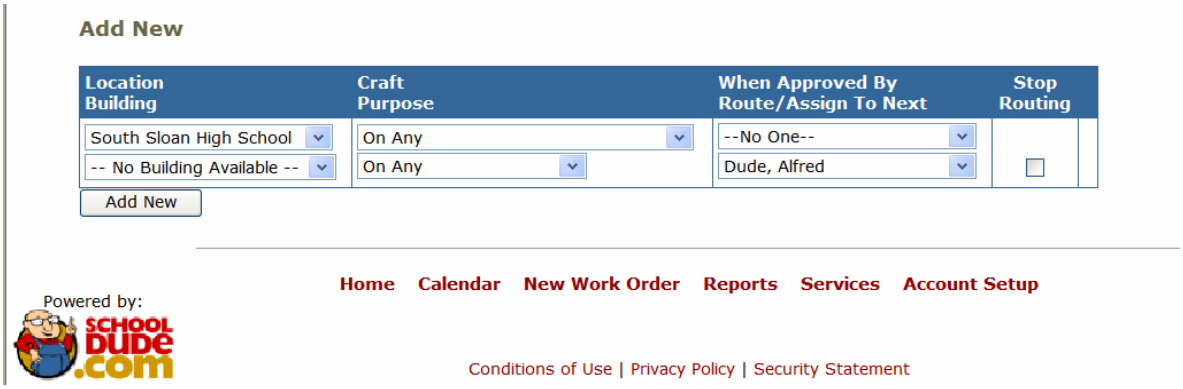
See below:



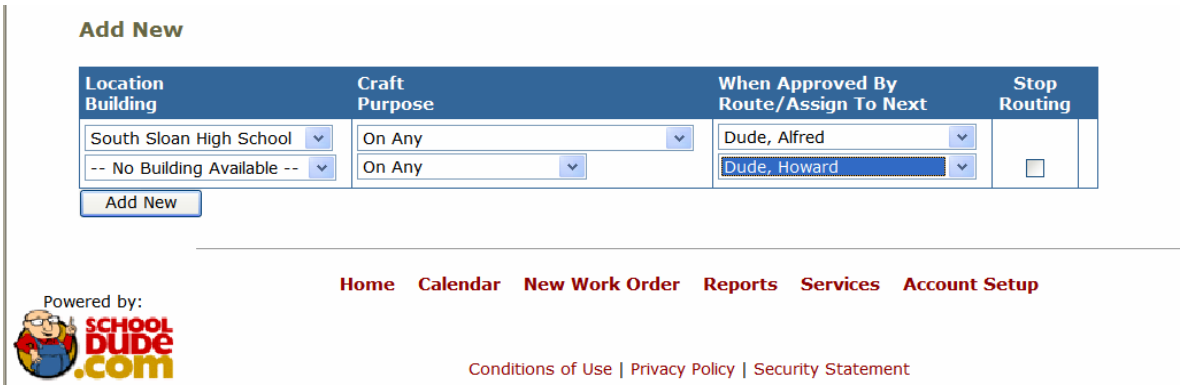
B. Approval-based Routing: If you would like for a principal or a site administrator to approve each work order before it is routed to the maintenance department, you would choose this method of routing. Your principal/site administrators will need to be in the system as a Site Administrator. You must make sure they have their location defined in their user account. To send all of your work orders to the principal, then to the maintenance department, you will just need two routes in your system for each location.

In the following example, Alfred Dude is the principal of Sloan High School and Howard Dude (distant cousin) is the head of the maintenance Department:

- In the Location drop-down box, you would choose "Sloan High School".
- For Craft and Purpose, you would select "On Any" from the drop-down boxes provided.
- In the "When Approved By Route/Assign to" section, you would select "No One" from the top drop-down box and "Alfred Dude" from the bottom drop-down box. See below:



- Click Add New to save this part of the routing process.
- Next, in the Location drop-down, you would again choose "Sloan High School".
- For Craft and Purpose, you would select "On Any" from both drop-down boxes.
- In the "When Approved By Route/Assign to" section, you would select "Alfred Dude" to go in the top box and then "Howard Dude" for the bottom box. See below:



- Click Add New to save.

➢ If the last person that the work order is routed to will be the person assigned to complete the work, you would check the Stop Routing box. This signals to our system that it the routing process is complete.

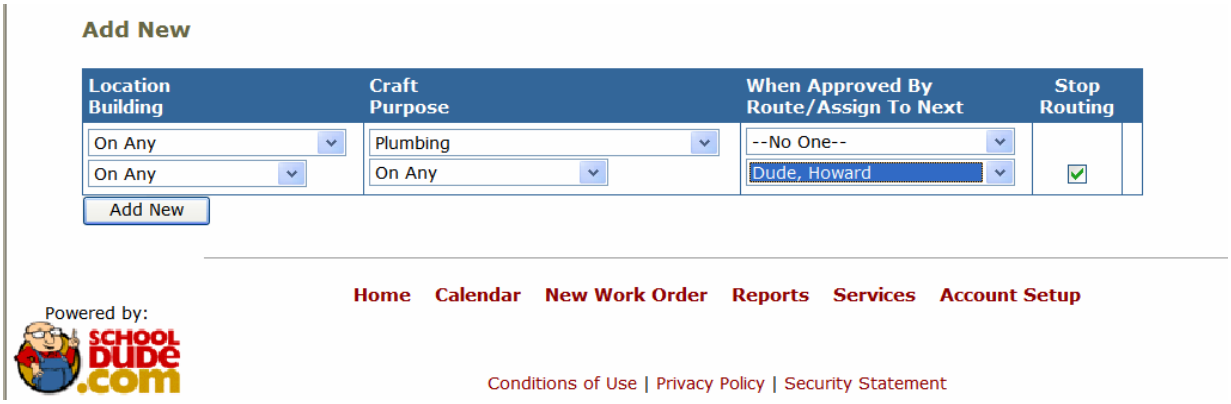
SCHOOLDUDE SAYS: Remember that any time a work order request is entered and a route is not defined, it is automatically sent to the comptroller. In the above example, anything that is not from Sloan High School would go to Ben Dude, who is the comptroller of the system.

C. Craft-based Routing: The craft-based method of routing routes work orders to different users based on the craft of the work order. For example, if you wanted all plumbing work orders to be routed directly to the plumber and all the electrical work orders routed to the electrician, you could do that using this method of routing. The plumber and the electrician would, of course, need to be in the system as either a supervisor or a technician.

To send all of your work orders by craft to certain users, you would need as many routes as you would different crafts.

In the following example, Howard Dude is a technician in charge of plumbing and Alfred Dude is a supervisor in charge of all electrical work orders:

- In the Location drop-down box, you would choose "On Any".
- For the Craft, you would select "Plumbing" from the drop-down box.
- For the Purpose, you would select "On Any".
- In the "When Approved By Route/Assign to" section, you would select "No One" to go in the top box and then "Howard Dude" for the bottom box.
- Since ALL plumbing requests are sent to Howard, the technician who handles plumbing, you would then click the Stop Routing box to indicate that the request will go no further. See below:

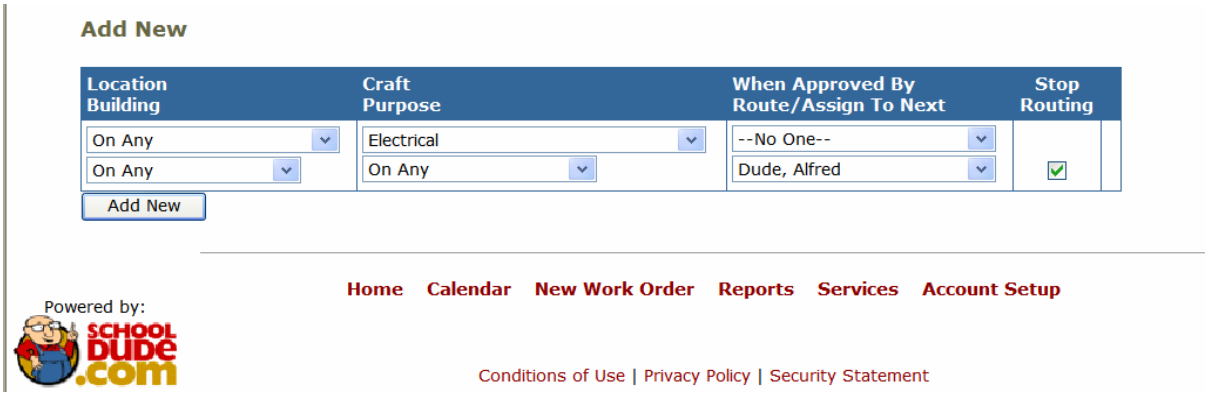


- Click Add New to save this part of the routing process. (This would send all plumbing requests to Howard Dude).
- Next, in the Location section, you would choose "On Any" from the drop-down box.
- For the Craft, you would choose "Electrical".

- For the Purpose, you would choose "On Any".

- In the "When Approved By Route/Assign to" section, you would select "No One" to go in the top box and then "Alfred Dude" for the bottom box.

- Since ALL electrical requests are sent to Alfred, the technician who handles electrical issues, you would then click the Stop Routing box to indicate that the request will go no further. See below:



- Click Add New to save this part of the routing. (This would send all electrical requests to Alfred Dude.)

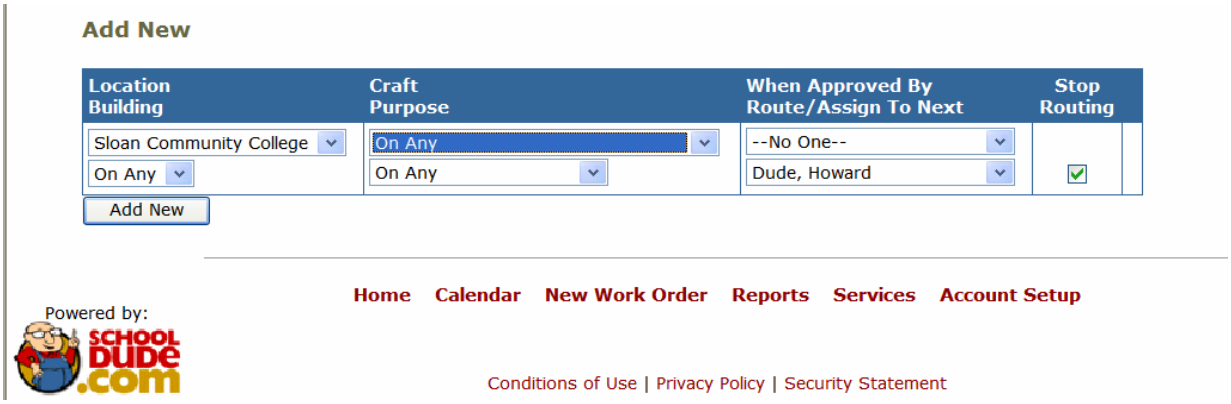
- You would continue with this process until you have covered all of the crafts used by your educational facility.

D. Site-based Routing: The site-based method of routing routes work orders to different users based on the location of the work order. This is useful for clients that have a head custodian or technician at each location.

An example would be if you wanted all work orders for Sloan High School to be routed directly to the head custodian. You can route to either supervisors or technicians. The head custodian/technician would need to be in the system as either a supervisor or a technician.

To send all of your work orders by location to certain users, you would need as many routes as you have different locations. In the following example, Howard Dude is now head custodian of Sloan Community College:

- In the Location section, you would choose "Sloan Community College".
- For the Craft and Purpose sections, you would select "On Any" to go in both drop-down boxes.
- In the "When Approved By Route/Assign to" section, you would select "No One" to go in the top box and then "Howard Dude" for the bottom box.
- If Howard was the only one assigned to complete work at Sloan Community College, you would then click the Stop Routing box. See below:



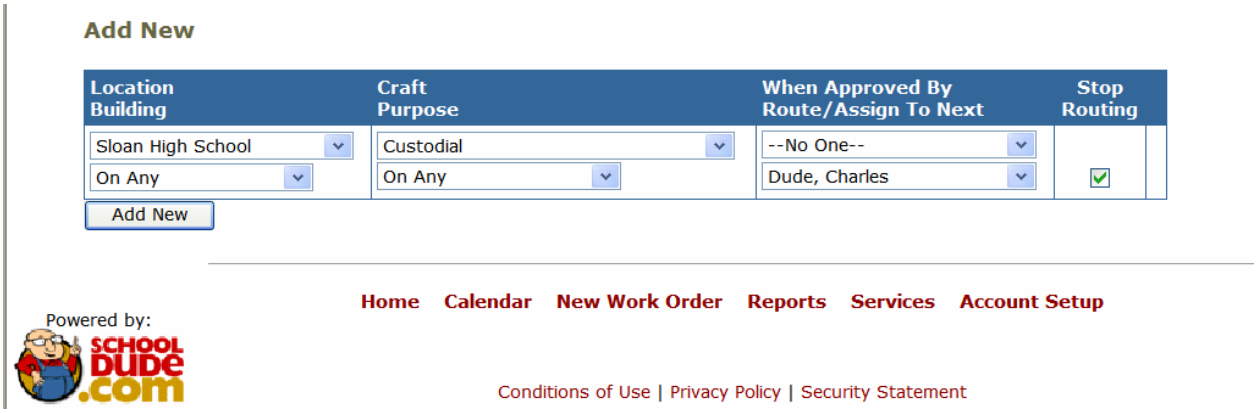
- Click Add New to save. (This would send all requests for Sloan Community College to Howard Dude.)
- You would then continue with this process until you have covered all Locations for your educational facility.

E. Combination of Craft-based and Site-based: You can also choose to have a combination of craft-based and site-based routes, if you want to route work orders to different users based on the location AND the craft of the work order. An example would be if you wanted all custodial work orders for Sloan High School to be routed directly to the head custodian, but you want all electrical work orders for Sloan High school to be routed directly to the electrician at that location. You can route to either supervisors or technicians. The head custodian/technician would need to be in the system as either a supervisor or a technician.

In the following example, let's go back to Sloan High School, where Charles Dude is the head custodian and Ben Dude is the electrician:

- In the Location section, you would select "Sloan High School".
- For the Craft, you would select "Custodial".
- For the Purpose, you would choose "On Any".
- In the "When Approved By Route/Assign to" section, you would select "No One" to go in the top box and then "Charles Dude" for the bottom box. This would send all custodial requests for Sloan High School to Charles Dude.
- If Charles will be the last person at Sloan High School to receive custodial work orders, click the Stop Routing box.

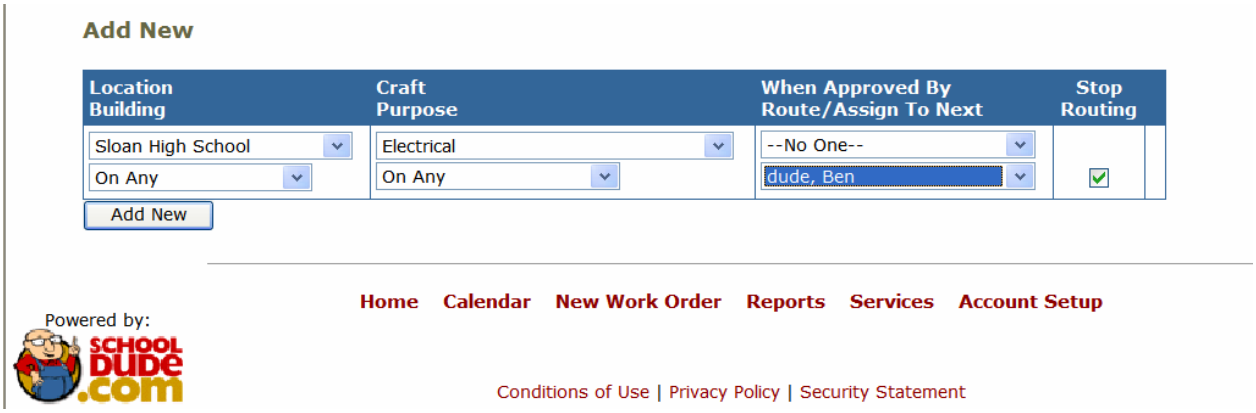
See below:



- Click Add New to save this part of the routing process.
- Next, in the Location section, you would select "Sloan High School".
- For the Craft, you would select "Electrical".

- For the Purpose, you would choose "On Any".
- In the "When Approved By Route/Assign to" section, you would select "No One" to go in the top box and then "Ben Dude" for the bottom box. This would send all electrical requests for Sloan High School to Ben Dude.
- If Ben will be the last person at Sloan High School to receive electrical work orders, click the Stop Routing box.

See Below:

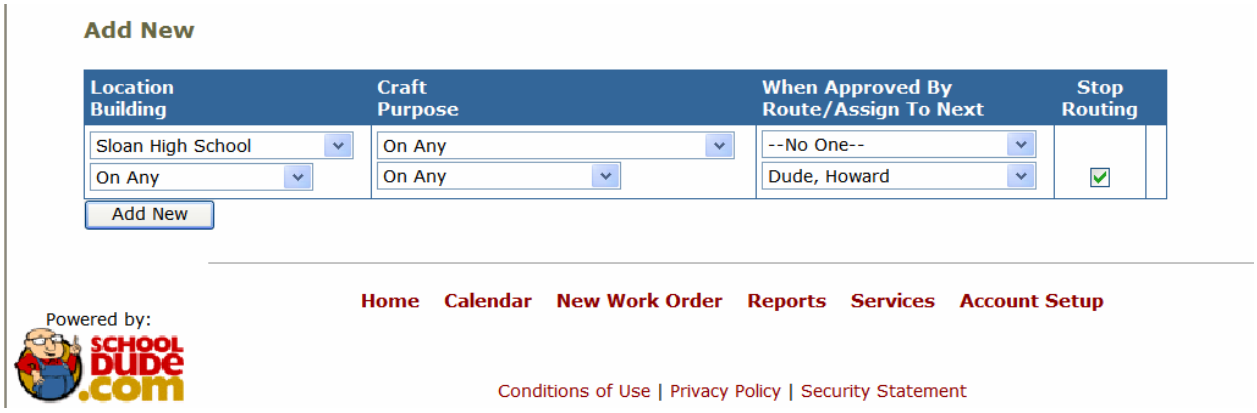


- Click Add New to save this part of the routing process.

➢ If you wanted work orders for the rest of the crafts in the system for Sloan High School to go to a user other than the comptroller (good old Howard again, for instance), you could set up one additional route:

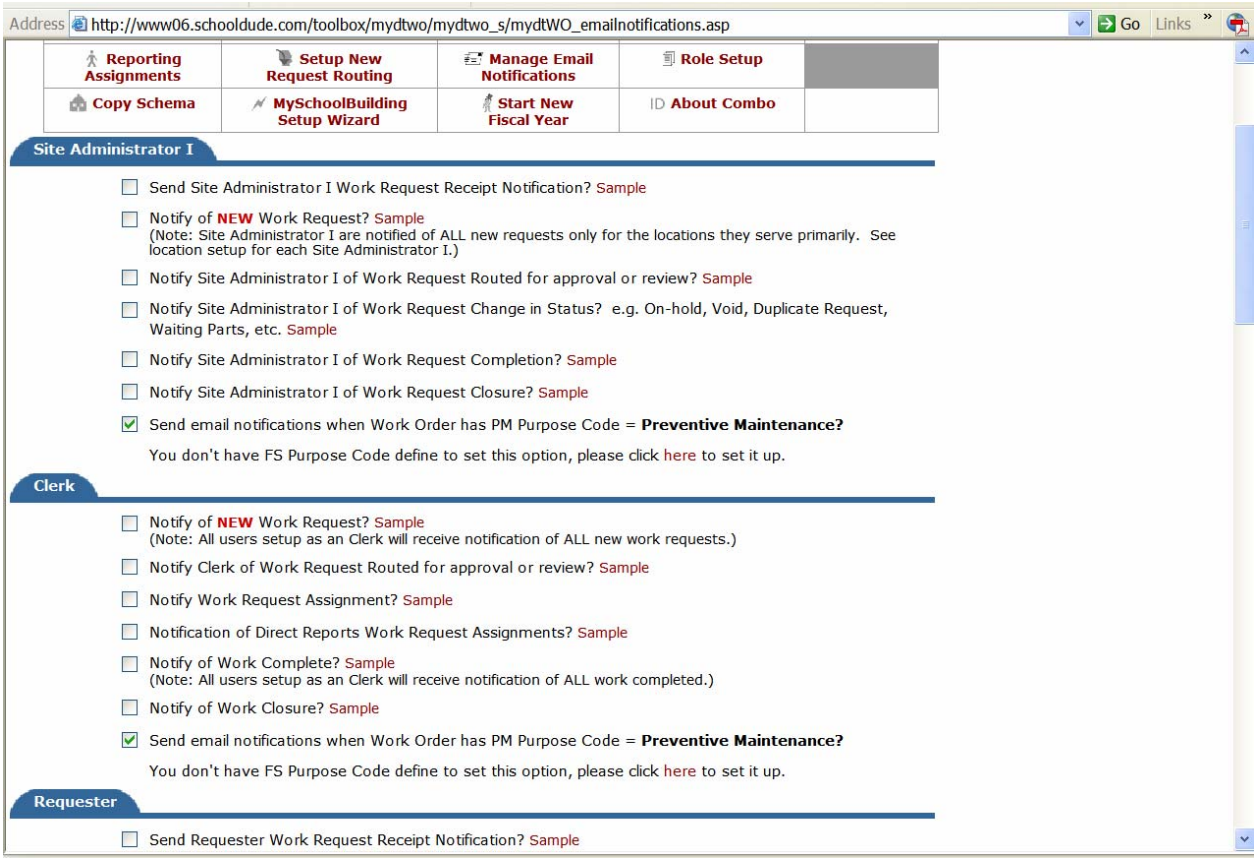
- In the Location section, select "Sloan High School".
- For the Craft, choose "On Any".
- For the Purpose, choose "On Any".
- In the "When Approved By Route/Assign to" section, you would select "No One" to go in the top box and then "Howard Dude" for the bottom box. This would send all requests that aren't custodial or electrical for Sloan High School to Howard. The system will try to find a route for the exact craft or location before going to a route for "On Any".
- If Howard would be the last person a non-electrical or non-custodial request would be sent to, click the Stop Routing box.

See below:



- Click Add New to save.

11. ☑ Manage Email Notifications: In this section of Account Setup, you can determine which automatic email notifications will go out to each user. Each role has a list of email notifications that you can choose from, all on one page:


Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtWO_emailnotifications.asp
Go
Links
Reporting Assignments
Setup New Request Routing
Manage Email Notifications
Role Setup
Copy Schema
MySchoolBuilding Setup Wizard
Start New Fiscal Year
ID About Combo
Site Administrator I
Send Site Administrator I Work Request Receipt Notification? Sample
Notify of NEW Work Request? Sample
(Note: Site Administrator I are notified of ALL new requests only for the locations they serve primarily. See location setup for each Site Administrator I.)
Notify Site Administrator I of Work Request Routed for approval or review? Sample
Notify Site Administrator I of Work Request Change in Status? e.g. On-hold, Void, Duplicate Request, Waiting Parts, etc. Sample
Notify Site Administrator I of Work Request Completion? Sample
Notify Site Administrator I of Work Request Closure? Sample
Send email notifications when Work Order has PM Purpose Code = Preventive Maintenance?
You don't have FS Purpose Code define to set this option, please click here to set it up.
Clerk
Notify of NEW Work Request? Sample
(Note: All users setup as an Clerk will receive notification of ALL new work requests.)
Notify Clerk of Work Request Routed for approval or review? Sample
Notify Work Request Assignment? Sample
Notification of Direct Reports Work Request Assignments? Sample
Notify of Work Complete? Sample
(Note: All users setup as an Clerk will receive notification of ALL work completed.)
Notify of Work Closure? Sample
Send email notifications when Work Order has PM Purpose Code = Preventive Maintenance?
You don't have FS Purpose Code define to set this option, please click here to set it up.
Requester
Send Requester Work Request Receipt Notification? Sample

- To turn on an email notification, simply click the check-box next to its description, if that check-box is empty. If there is already a green check in the box and you wish to turn the notification off, click the box to remove the check.

- Go all the way through each Role's list and then click Submit at the bottom of the page to save.

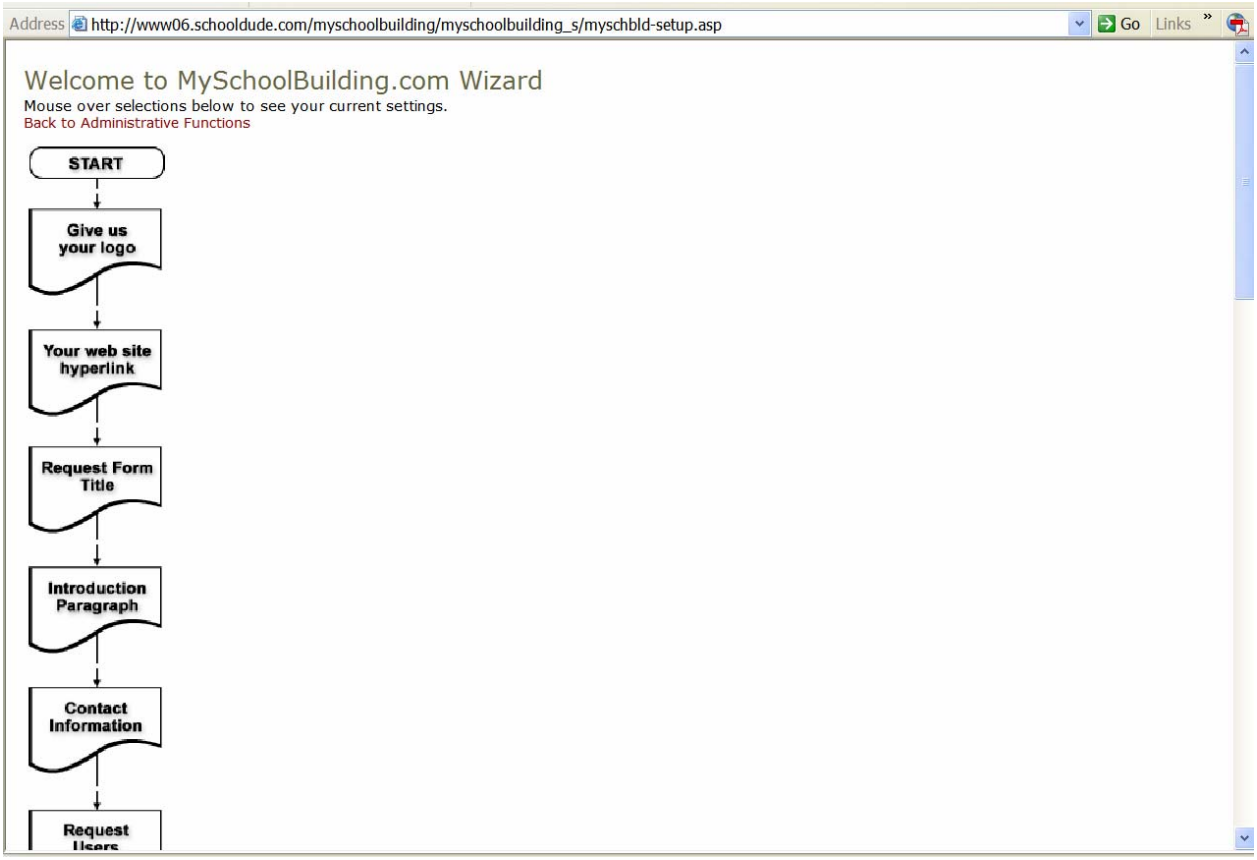
- To reset email notification options, click Reset.

- When the page refreshes, you will be taken back to the top. Your options have been saved.

12. MySchoolBuilding.com Setup: This is where you set up the information and options for your educational facility on MySchoolBuilding.com, the site where Requesters go to make requests. This site is available to all MaintenanceDirect roles, but Requesters will go directly here to log in.

- To get started, click on the MySchoolBuilding Setup Steps link at the bottom of the **Account Setup** page, or choose the Setup MySchoolBuilding Shortcut at the top of the **Account Setup** page. Follow these steps:

- Once you click on the appropriate link, you will be taken to the MySchoolBuilding.com Setup Steps page, which looks something like this:



- To start the wizard, click the Start button on the flowchart. As you complete each step of the flowchart, you will automatically be taken to the next step in the flow chart when you click Next Step. To skip to any other step, click on that step in the flow chart.

- Follow through each step of the wizard until your **MySchoolBuilding.com** has been set up. You will be taken through the following:

  - ✓ **Set up your Organization Logo**: This will not only set the logo for your **MySchoolBuilding** page, but it will also set the same logo for your MaintenanceDirect account (it will display in the upper left-hand corner). Click the Browse button to find the logo you would like to display at the top of your **MySchoolBuilding** page. When you've chosen it, click Add/Update Logo and then Next Step. (Keep in mind that your logo will need to be a gif no larger that 150 x 50 pixels.)

  - ✓ **Your web site hyperlink**: This is used on MySchoolBuilding to provide a way for your requesters to get back to your web site. It is optional so if you don't have one, leave it blank.

  - ✓ **Request Form title**: Enter the title you would like for your Request form to have here.

  - ✓ **Introduction Paragraph**: Choose or write your introduction paragraph for MySchoolBuilding here. This will be the first thing that Requesters read upon entering MySchoolBuilding.com. You can write your own or choose from three available introduction options.

  - ✓ **Contact Information**: Your customers need to know who to contact in your department or organization in case of an emergency. Please indicate who they would call and their phone number (you can add as many as you need).

  - ✓ **Request Users**: List and add Requesters here.

  - ✓ **MySchoolBuilding Password**: Choose the password for MySchoolBuilding.com here.

  - ✓ **Budget Code/Selected Budget Codes for Requester**: Choose a default budget code from the budgets you entered earlier. Select the budget codes you wish for Requesters to see and use.

  - ✓ **Show/Hide Assigned To**: "Assigned To" is hidden on the My Requests listing for work orders. Decide whether or not you want to show "assigned to" information or the Requests page. Also, decide whether or not phone number and area/room number are required fields.

  - ✓ **Default Purpose Code/Selected Purpose Codes for Requester**: Select purpose codes you wish requesters to see and use.

- ✓ **Requested Completion Date**: Decide whether or not to hide requested completion date.

- ✓ **Select Craft Format**: Requesters will see craft selection as icons. You could keep this setting or choose "Combo List" instead.

- ✓ **Show/Hide Buildings**: Building information is hidden on the MySchoolBuilding work order request form. You can choose whether or not to show it.

- ✓ **Time Available for Maintenance**: Time available for maintenance is hidden on the MySchoolBuilding work order request form. You can choose whether or not to show it.

- ✓ **Email Us**: Enter the email address that you would like Requesters to use to contact you with questions/comments here.

- ✓ **Show/Hide Attachment**: Attach New File is hidden on the My Requests listing for work orders. You can choose whether or not to show it.

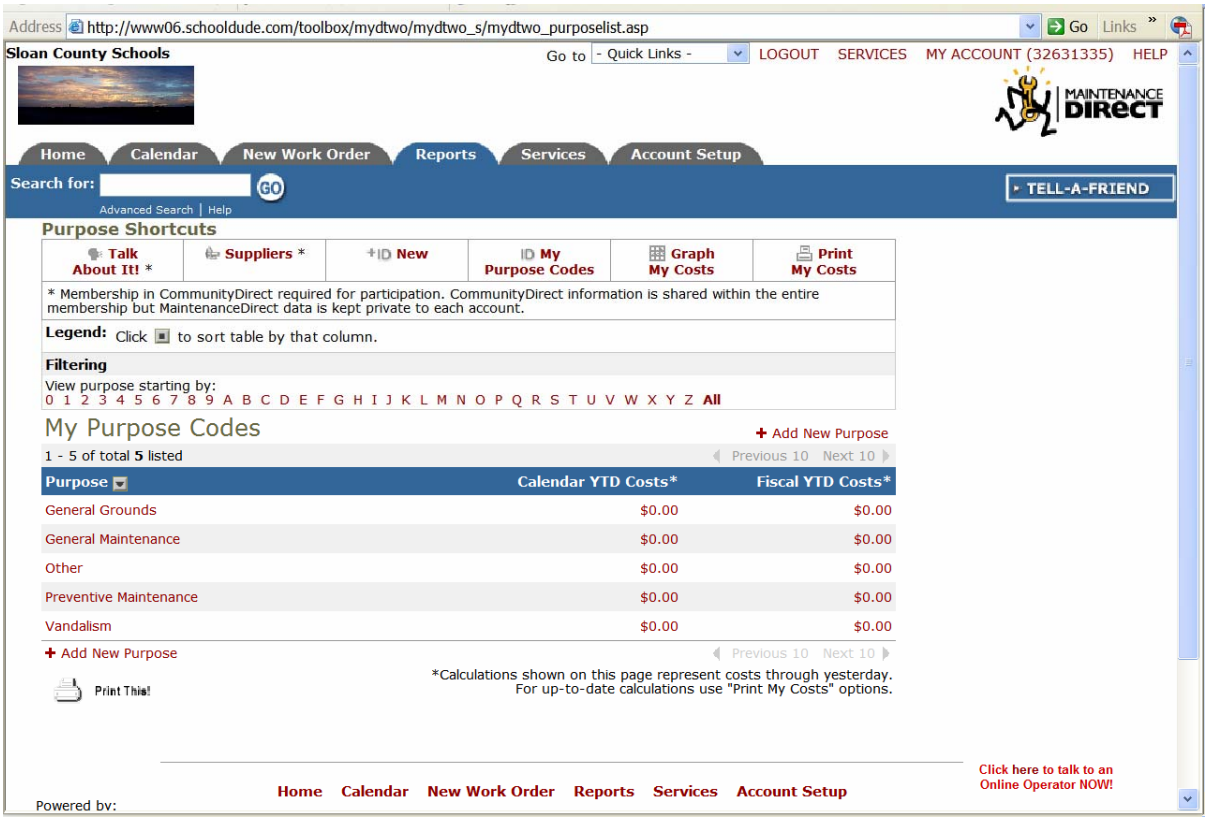
- ✓ **View Sample**: Gives you a link to click to view a sample of the page that requesters will see at MySchoolBuilding.com.

You've finished your MySchoolBuilding setup!

13. Purpose (Purpose Codes): Purpose codes provide a way that you can categorize work orders in order to simplify reports and keep up with what has been done and why. Simply put, a purpose code is the reason that is given for doing the work.

For example, "Vandalism" is a purpose code that is automatically provided to every account. By using this purpose code, you could then run a report to see how much you spent on vandalism in a given time period. Purpose codes are not required, but can go a long way to help with tracking work orders and organizing your records.

- To get started with entering purpose codes, simply click on the Purpose link from the **Account Setup** page. You will be taken to the **My Purpose Codes** page, which will look something like this:


Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_purposelist.asp
Go Links
Sloan County Schools
Go to - Quick Links -
LOGOUT SERVICES MY ACCOUNT (32631335) HELP
MAINTENANCE DIRECT
Home Calendar New Work Order Reports Services Account Setup
Search for: GO
Advanced Search | Help
TELL-A-FRIEND
Purpose Shortcuts
Talk About It! * Suppliers * New My Purpose Codes Graph My Costs Print My Costs
* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.
Legend: Click to sort table by that column.
Filtering
View purpose starting by:
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All
My Purpose Codes
Add New Purpose
1 - 5 of total 5 listed
Previous 10 Next 10
Purpose
Calendar YTD Costs*
Fiscal YTD Costs*
General Grounds $0.00 $0.00
General Maintenance $0.00 $0.00
Other $0.00 $0.00
Preventive Maintenance $0.00 $0.00
Vandalism $0.00 $0.00
Add New Purpose
Previous 10 Next 10
Print This!
*Calculations shown on this page represent costs through yesterday.
For up-to-date calculations use "Print My Costs" options.
Click here to talk to an Online Operator NOW!
Home Calendar New Work Order Reports Services Account Setup
Powered by:

The **My Purpose Codes** page will already contain the purpose codes of "General Grounds", "General Maintenance", "Other", "Preventive Maintenance", and "Vandalism". If there are other purpose codes you would like to add to this list, simply click the ✚Add New Purpose link (near the top, right-hand and bottom, left-hand corners of the Purpose Codes list) and follow these steps:

- In the Purpose Description box provided, enter the purpose code that you would like to create.

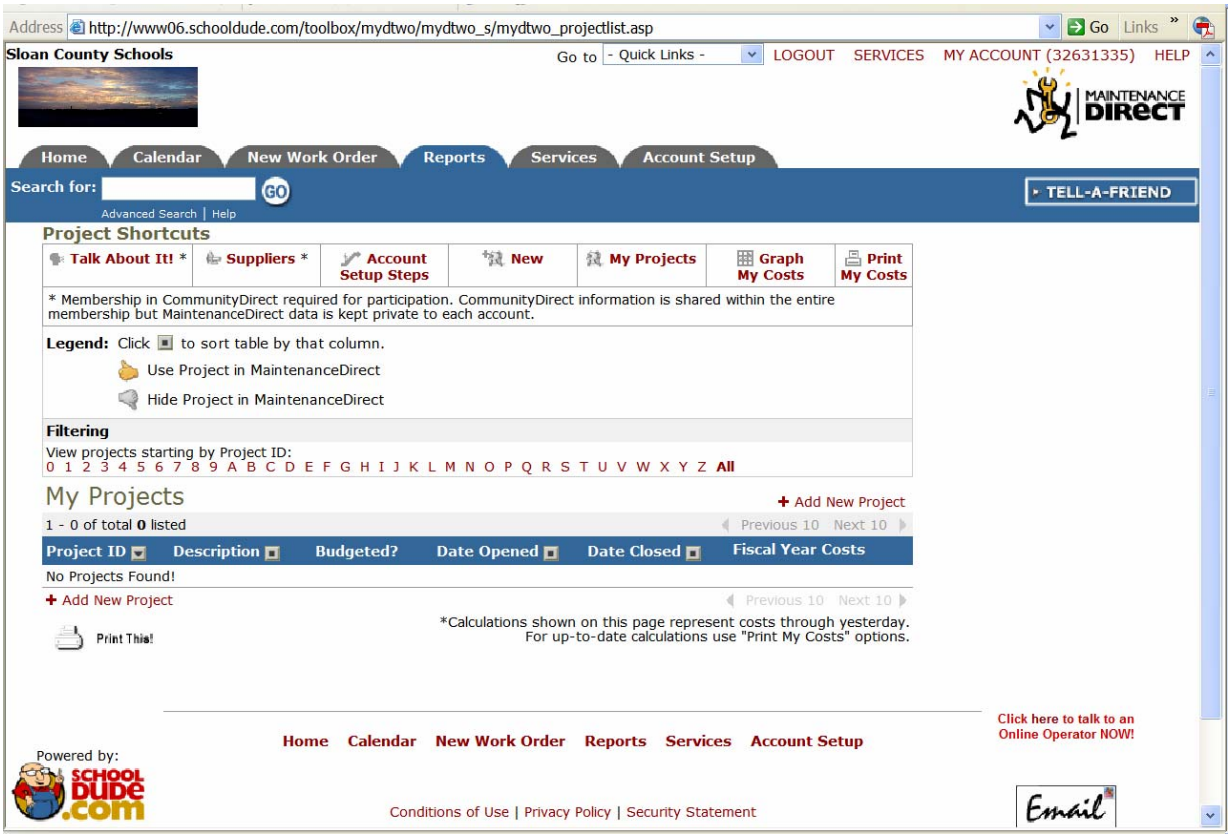
- Click Submit.

That's all there is to it! When you click "Submit", you will be taken back to the **My Purpose Codes** page, where you will see your new purpose code has been added.

14. Projects (Project Codes): Project Codes are another option intended to help simplify the reports process by further specifying the work being done. They provide a way to group several work orders together into a common project. Applying the same project code to each of the work orders allows you to run reports on how much all the various aspects (all the different work orders) related to a particular project cost. Like Purpose Codes, Projects are not required, but they can be very useful to the reporting process.

When you have a project to start, take the following steps to enter it into MaintenanceDirect:

- Click on the Projects link on the **Account Setup** page.
- You will be taken to the **My Projects** page, which will look something like this:



- Click the +Add New Project link (near the top, right-hand and bottom, left-hand corners of the My Projects list).
- Enter the Project Code you wish to use for this project.

- If you wish, enter the Project Description, the Open and Close dates, and whether or not this project is budgeted. You can also click in the check box provided if you would like to make the project inactive (one instance where you would do this would be if the project hasn't been started yet, but will be in the future).

- Click Add/Update Record.

That's it! You will automatically be taken back to the **My Projects** page, where you will see your new project listed.

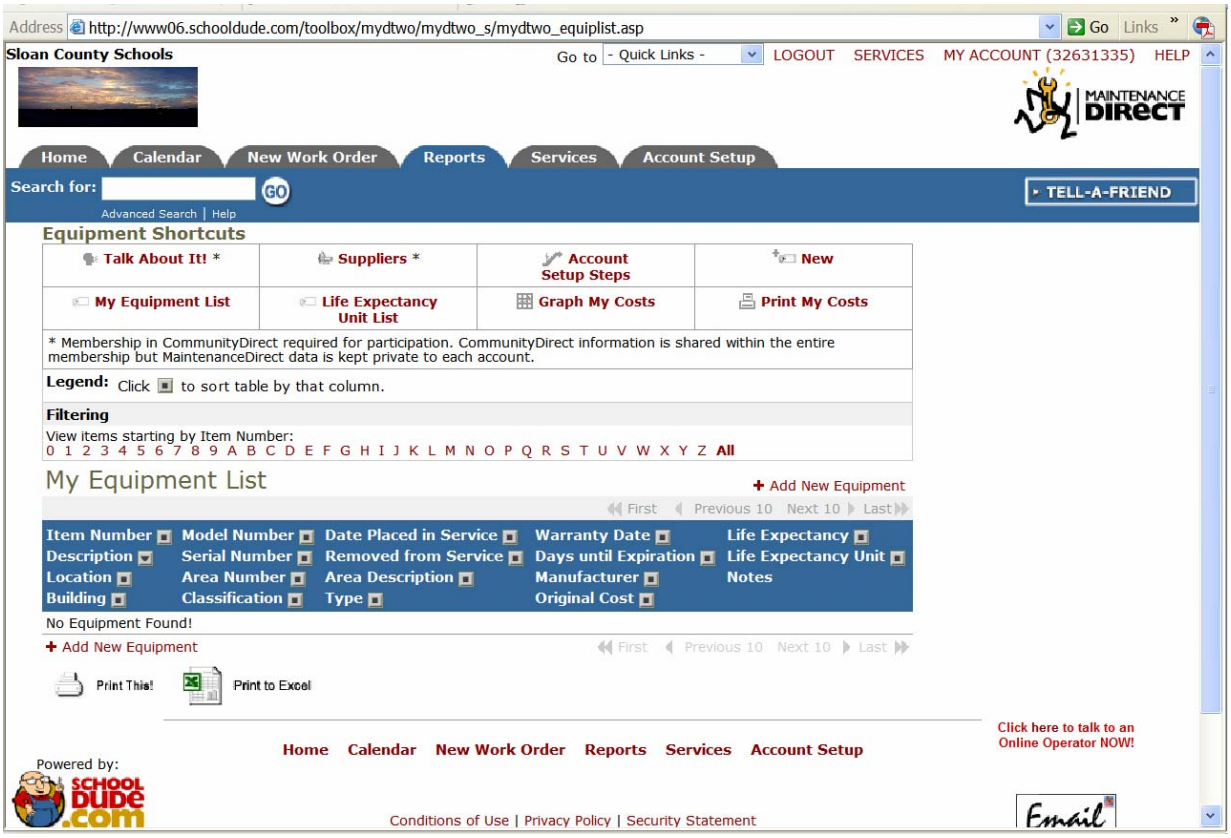
- On the My Projects list, a yellow thumbs-up ( ) next to the project name indicates that the project is used in MaintenanceDirect. To hide the project in MaintenanceDirect (if it is currently inactive until a future date, for instance), click on the yellow thumbs-up to change it to a gray thumbs-down ( ), which indicated that it's hidden.

- To edit/delete a project, simply click on that project's name on the **My Projects** page list. You will be taken to the **Add/Update Project** page, containing that project's information. Make any changes you wish to make and click the Add/Update Record button. If you would like to delete this project, simply scroll to the bottom of the page and click the Delete Record button.

SCHOOLDUDE SAYS: Once there are costs tied to a project, you will be unable to delete it.

15. Equipment: This is where you can list all of the equipment that your educational facility has for maintenance purposes. This way, you can keep up with what equipment you have, warranty information, when and where it's being used, and more. To start entering your equipment's information, take the following steps:

- On the **Account Setup** page, click on the Equipment link.
- You will be taken to the **My Equipment List** page, which will look something like this:


Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_equiplist.asp
Sloan County Schools
Go to - Quick Links -
LOGOUT SERVICES MY ACCOUNT (32631335) HELP
MAINTENANCE DIRECT
Home Calendar New Work Order Reports Services Account Setup
Search for:
Advanced Search | Help
TELL-A-FRIEND
Equipment Shortcuts
Talk About It! * Suppliers * Account Setup Steps New
My Equipment List Life Expectancy Unit List Graph My Costs Print My Costs
* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.
Legend: Click to sort table by that column.
Filtering
View items starting by Item Number:
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All
My Equipment List
Add New Equipment
First Previous 10 Next 10 Last
Item Number Model Number Date Placed in Service Warranty Date Life Expectancy
Description Serial Number Removed from Service Days until Expiration Life Expectancy Unit
Location Area Number Area Description Manufacturer Notes
Building Classification Type Original Cost
No Equipment Found!
Add New Equipment
First Previous 10 Next 10 Last
Print This! Print to Excel
Home Calendar New Work Order Reports Services Account Setup
Click here to talk to an Online Operator NOW!
Powered by:
SCHOOL DUDE .com
Conditions of Use | Privacy Policy | Security Statement
Email

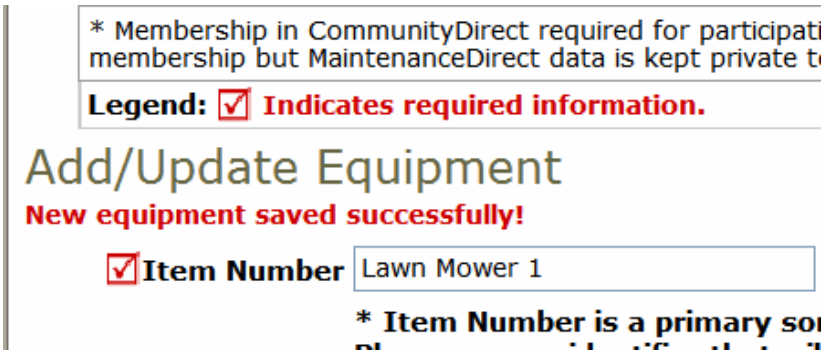
- On this page, click the **+**Add New Equipment link.
- You will be taken to the **Add/Update Equipment** page. Enter your equipment's information, including:
  - ✓ Item Number (required)
  - ✓ Classification
  - ✓ Type
  - ✓ Description
  - ✓ Manufacturer
  - ✓ Supplier
  - ✓ Date purchased
  - ✓ Original Cost

- ✓ Location
- ✓ Building
- ✓ Area
- ✓ Area Number
- ✓ Tag Number
- ✓ Model Number
- ✓ Serial Number
- ✓ Out of Service Begin
- ✓ Out of Service End
- ✓ Date Placed
- ✓ Date Removed
- ✓ Warranty Expires
- ✓ Life Expectancy Unit
- ✓ Life Expectancy
- ✓ Notes
- ✓ Reading Measurement
- ✓ Current Reading
- ✓ Previous Reading
- ✓ Usage Unit of Measure

- Be sure to decide whether or not to include any notes you've made on the work order form when it prints.

- Click Save.

When the page refreshes, you will be taken back to the top of the **Add/Update Equipment** page, where you will see the words "New Equipment Saved Successfully!" in red near the top (see below).


* Membership in CommunityDirect required for participati
membership but MaintenanceDirect data is kept private t
Legend: Indicates required information.
Add/Update Equipment
New equipment saved successfully!
Item Number
Lawn Mower 1
* Item Number is a primary so

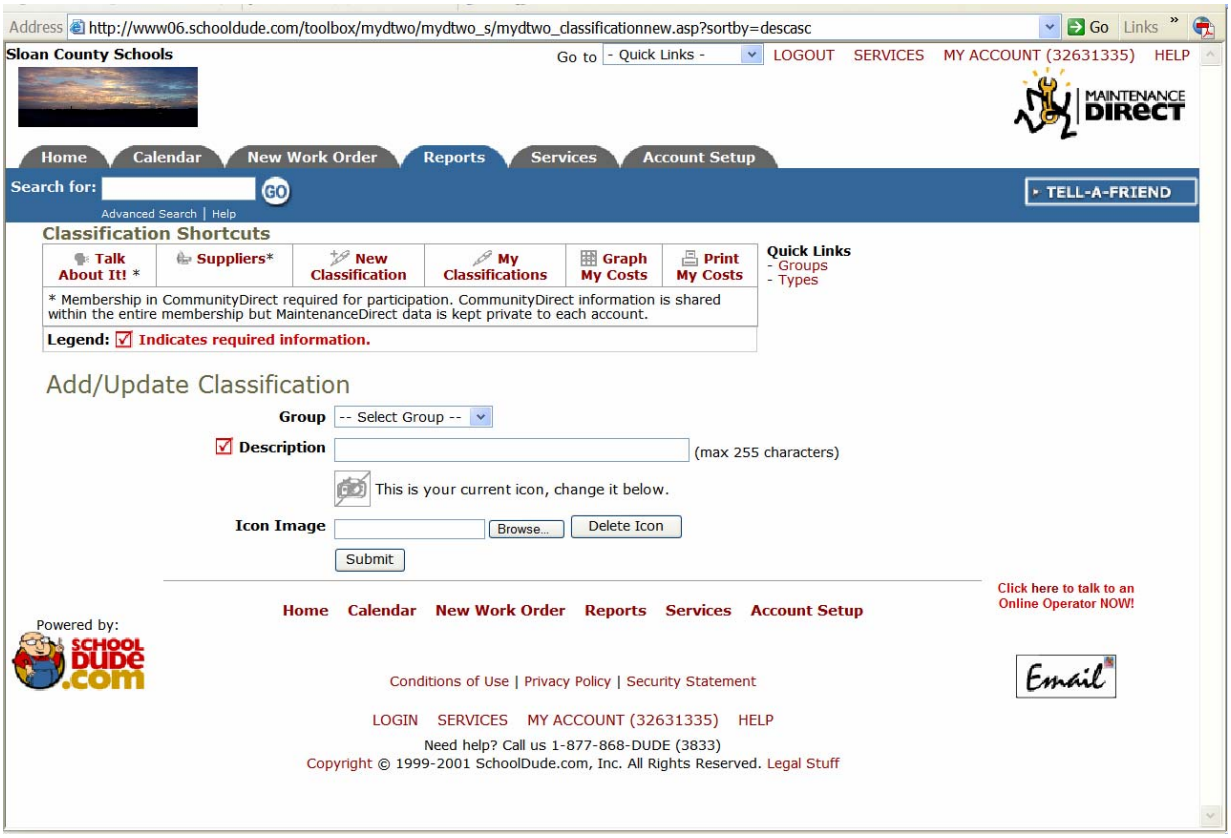
Repeat this process until all of the desired equipment has been entered.

SCHOOLDUDE SAYS: The next three sections (**Classifications** and **Types**) take managing your equipment a few steps further in that they are all ways that you can narrow down the fields for monitoring equipment used at your facility. They are optional but are there just to make things a little easier for you and those responding to work orders at your educational facility.

16. Classifications: Classifications are just a way of breaking down equipment by what it's used for. For instance, a classification could be "lawn equipment" or "HVAC".

To get started adding Classifications, do the following:

- Click on the Classifications link on the **Account Setup** page.
- On the **My Classifications** page, click on the +Add New Classification link.
- You'll be taken to the **Add/Update Classification** page, which looks something like this:



- Enter the Classification you would like to add into the Description field provided.
- If you have an icon you would like to use to mark this Classification, click the Browse button and add it. To delete an icon, just click the Delete Icon button provided.
- Click Submit.
- You will automatically be taken back to the **My Classifications** page, which will show that your new classification has been added.

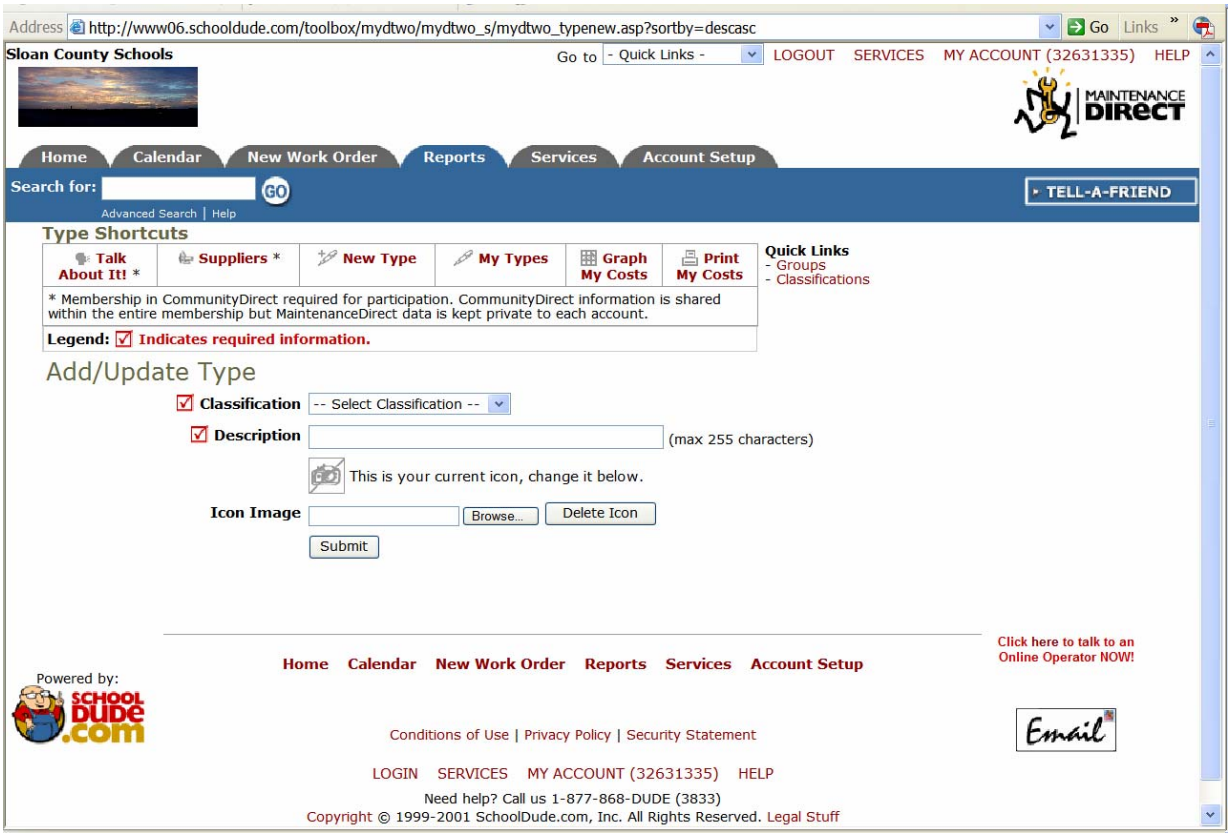
- To edit or delete a classification, simply click on the name of the classification on the **My Classifications** page. On the **Add/Update Classification** page, either make the desired change and click Submit or scroll down and click Delete Record.

SCHOOLDUDE SAYS: You will **NOT** be able to delete a classification once there are costs associated with it.

17. Types: Types are a way of further narrowing the classification of your equipment. For instance, if your classification is "Lawn Equipment", then your type could be "Lawn Mower" or "Leaf Blower".

To get started adding Types, do the following:

- Click the Types link on the **Account Setup** page.
- On the **My Types** page, click the **+**Add New Type link.
- You will be taken to the **Add/Update Type** page, which will look something like this:



- Select the Classification of the equipment.
- In the box provided, enter the new Type of equipment that you wish to add.
- If you have an icon you would like to use to mark this Type, click the Browse button and add it. To delete an icon, just click the Delete Icon button provided.

- Click Submit.

- You will automatically be taken back to the **My Types** page, which will show that your new type has been added.

    - To edit or delete a classification, simply click on the name of the classification on the **My Classifications** page. On the **Add/Update Classification** page, either make the desired change and click Submit or scroll down and click Delete Record.

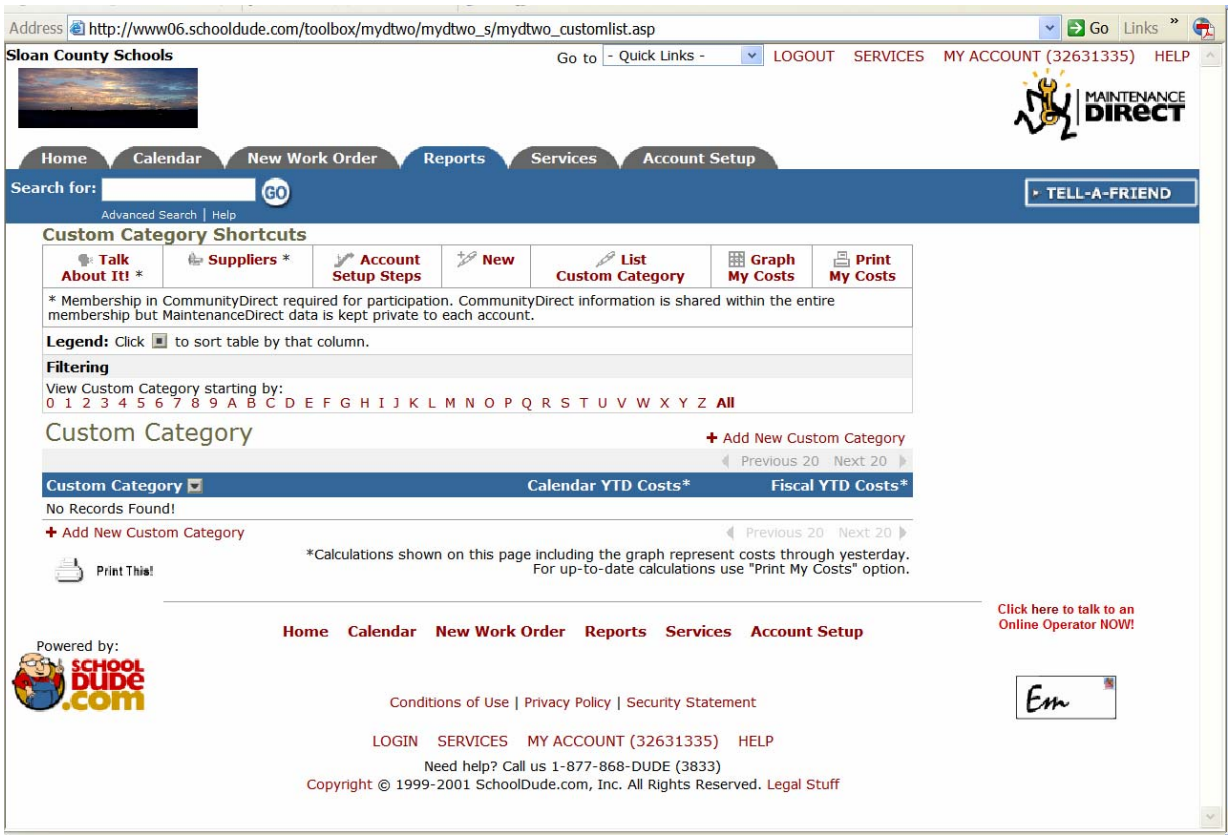
SCHOOLDUDE SAYS: You will **NOT** be able to delete a type once there are costs associated with it.

18. Custom Category: If there is a category of information that you think should be noted or available for entry on all of your work orders that we don't have listed under the Manage Codes section, this is where you can create your own code. This way, you customize your work orders to require the information that you would like to have included.

To get started adding custom categories, do the following:

- Click on the Custom Category link on the **Account Setup** page.

- You will be taken to the **Custom Category** page, which will look like this:


Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_customlist.asp
Go Links
Sloan County Schools
Go to - Quick Links - LOGOUT SERVICES MY ACCOUNT (32631335) HELP
MAINTENANCE DIRECT
Home Calendar New Work Order Reports Services Account Setup
Search for: GO
Advanced Search | Help
TELL-A-FRIEND
Custom Category Shortcuts
Talk About It! * Suppliers * Account Setup Steps New List Custom Category Graph My Costs Print My Costs
* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.
Legend: Click to sort table by that column.
Filtering
View Custom Category starting by:
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All
Custom Category
Add New Custom Category
Previous 20 Next 20
Custom Category Calendar YTD Costs* Fiscal YTD Costs*
No Records Found!
Add New Custom Category
Previous 20 Next 20
Print This!
*Calculations shown on this page including the graph represent costs through yesterday.
For up-to-date calculations use "Print My Costs" option.
Click here to talk to an Online Operator NOW!
Home Calendar New Work Order Reports Services Account Setup
Powered by:
SCHOOL DUDE .com
Conditions of Use | Privacy Policy | Security Statement
LOGIN SERVICES MY ACCOUNT (32631335) HELP
Need help? Call us 1-877-868-DUDE (3833)
Copyright © 1999-2001 SchoolDude.com, Inc. All Rights Reserved. Legal Stuff

- Click the +Add New Custom Category link.

- On the **Custom Category Add/Update** page, enter your Custom Category Description in the space given.

- If you own PreventiveMaintenanceDirect and would like for this custom category to be displayed in it, click the check-box provided next to the words "Display in PMD".

- Click Submit.

You will automatically be taken back to the **Custom Category** page where you will see your new custom category has been added to the Custom Category list.

- To change or update a custom category's name or to change whether or not you would like for a custom category to be displayed in PMD, click that custom category's name on the Custom Category list, make the changes you wish to make on the **Custom Category Add/Update** page, and click Submit.

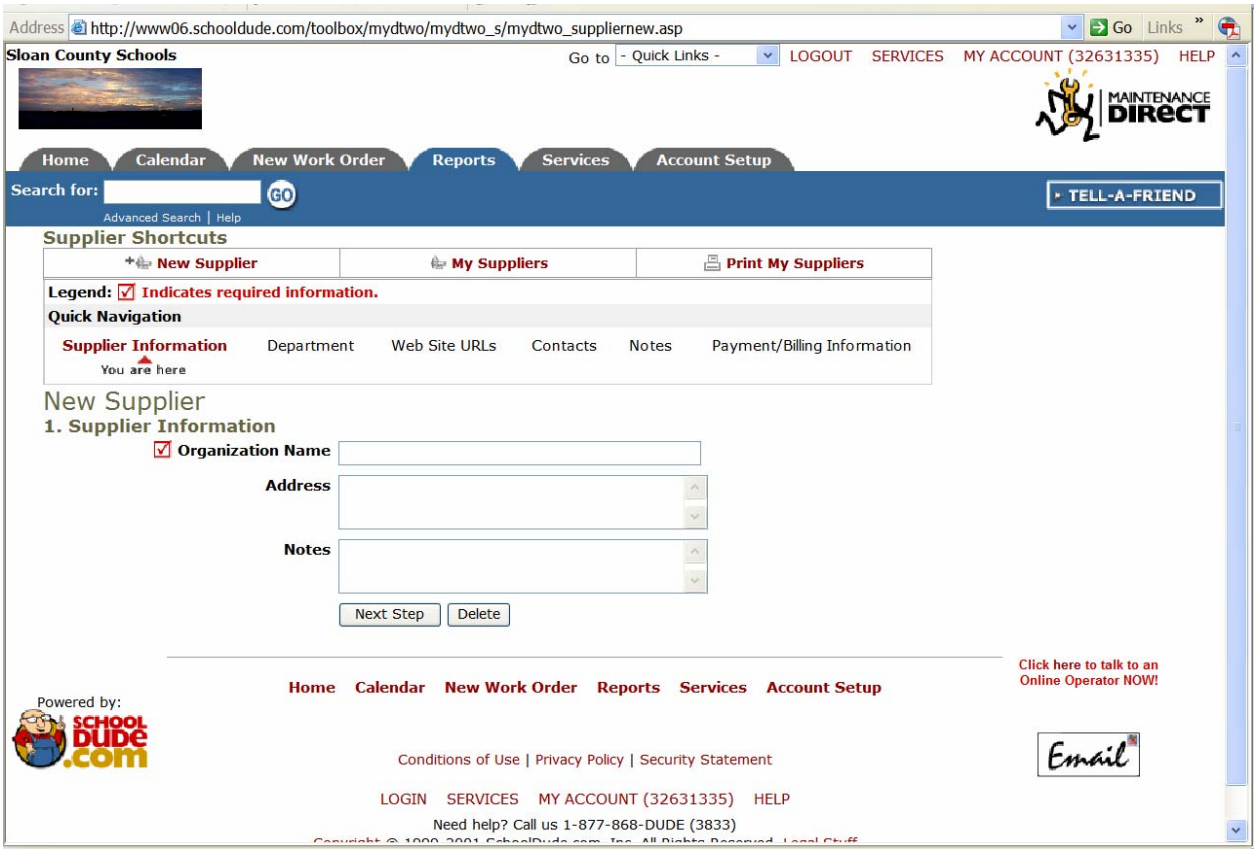
- To delete a Custom Category, click on that custom category's name on the Custom Category list and then click the Delete button at the bottom of the **Custom Category Add/Update** page.

SCHOOLDUDE SAYS: You will be unable to delete a custom category once there are costs attached to it.

19. Suppliers: This optional step in the Account Setup process allows you to keep track of all of the suppliers used by your educational facility when ordering equipment and supplies for various projects.

To start adding suppliers, follow these steps:

- On the Account Setup page, click on the Suppliers link.
- On the **My Suppliers** page, click the **+**Add New Supplier link.
- You will be taken to the **New Supplier** page, which will look like this:



- Enter the Organization Name (the name of the supplier) here.
- If you have the Supplier's address, enter it here.
- Include any notes you wish to include in the field provided.
- Click Next Step.

- If you would like to create a department name (if specifying a particular department of your supplier is necessary), enter the name, address, phone, fax, and/or any notes here. If you want, you can choose to skip this step.

- Click Next Step.

- If you wish to enter your supplier's web site information, do so here. You may also choose to skip this step if you wish.

- Click Next Step.

- Define Contacts: Enter the first and last name of your contact at this supplier and provide any other contact information you wish to include (department, phone, fax, cell, email, notes, etc.) To add more than one contact, click Add after filling in the first contact's name and information.

- Click Next Step.

- Create New Note: Enter any further notes you wish to include on this supplier. You may skip this step, if you wish.

- Click Next Step.

- Payment/Billing Information: Enter your supplier's billing information here (Payment Terms (add Payment Terms by clicking the Add/Edit Terms link provided), Delivery Terms, Federal ID#, Credit Limit, Minimum Order Amount, Surcharge, and whether or not they are active).

- Click Submit.

- You will be taken back to the **My Suppliers** page, which will show your newest supplier has been added.

➢ To update supplier information, click on that supplier's name in the **My Suppliers** list. Proceed through the steps above, making the desired changes to your supplier's information and click Submit when finished.

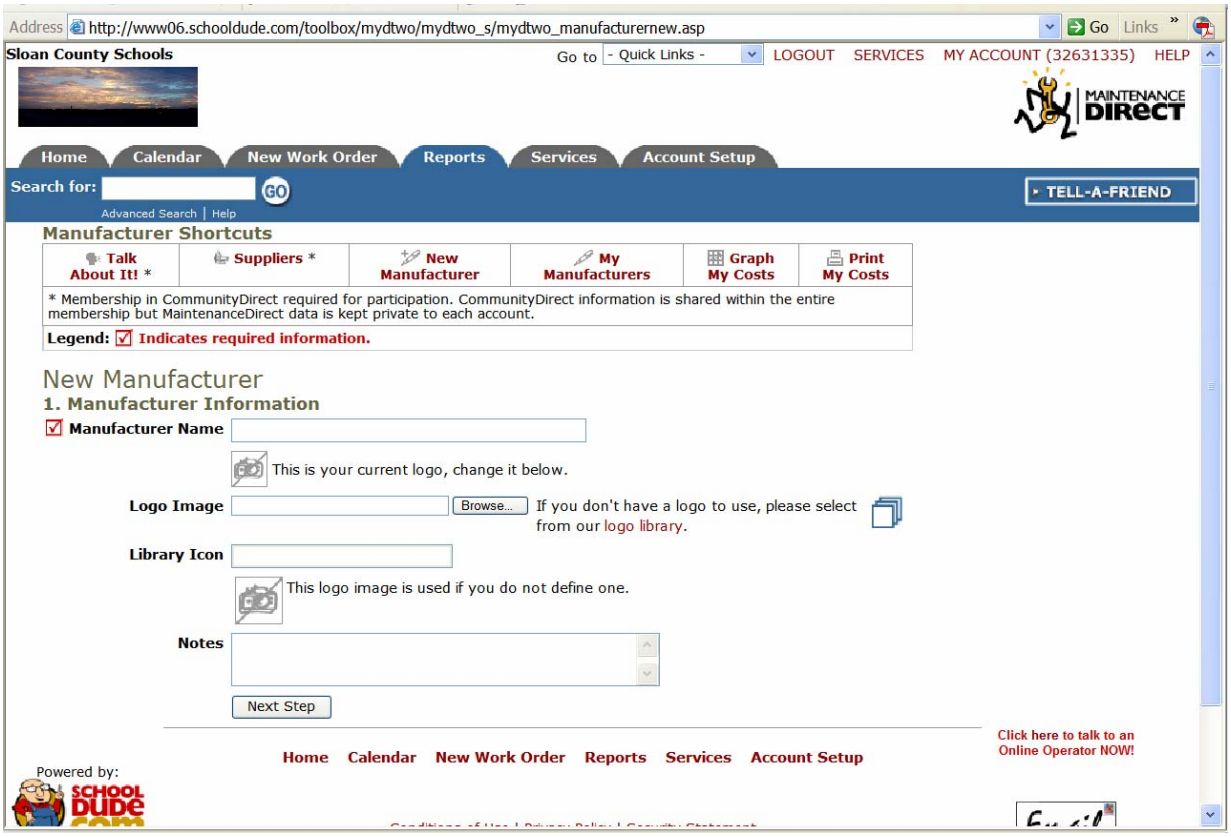
➢ To delete a supplier once it's been added and before any costs are tied to it, simply click on that supplier's name in the My Supplier list. In the first "Update Supplier" step, click the Delete button at the bottom of the page, beneath the Notes field. A gray confirmation box will appear to make sure that you want to delete the supplier. Click OK. You will then be taken back to the **My Suppliers** page, which will show that the supplier has been deleted.

SCHOOLDUDE SAYS: Keep in mind that you will **NOT** be able to delete a supplier once you have costs associated with it.

20. Manufacturers: In this section, you can enter the information of any equipment manufacturers that your educational facility uses. This, like the Suppliers section, is optional, but comes in handy when running reports.

To get started adding Manufacturers, do the following:

- Click on the Manufacturers link on the **Account Setup** page.
- On the **My Manufacturers** page, click on the +Add New Manufacturer link.
- You will be taken to the **New Manufacturer** page, which will look like this:


Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_manufacturernew.asp
Go Links
Sloan County Schools
Go to - Quick Links - LOGOUT SERVICES MY ACCOUNT (32631335) HELP
MAINTENANCE DIRECT
Home Calendar New Work Order Reports Services Account Setup
Search for: GO
Advanced Search | Help
TELL-A-FRIEND
Manufacturer Shortcuts
Talk About It! * Suppliers * New Manufacturer My Manufacturers Graph My Costs Print My Costs
* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.
Legend: Indicates required information.
New Manufacturer
1. Manufacturer Information
Manufacturer Name
This is your current logo, change it below.
Logo Image
Browse...
If you don't have a logo to use, please select from our logo library.
Library Icon
This logo image is used if you do not define one.
Notes
Next Step
Home Calendar New Work Order Reports Services Account Setup
Click here to talk to an Online Operator NOW!
Powered by:
SCHOOL DUDE .COM

- On this page, enter the Manufacturer Name in the field provided (this is the only required information).
- If you like, browse and enter the Logo Image, Library Icon, and/or any notes you would like to include.
- Click Next Step.

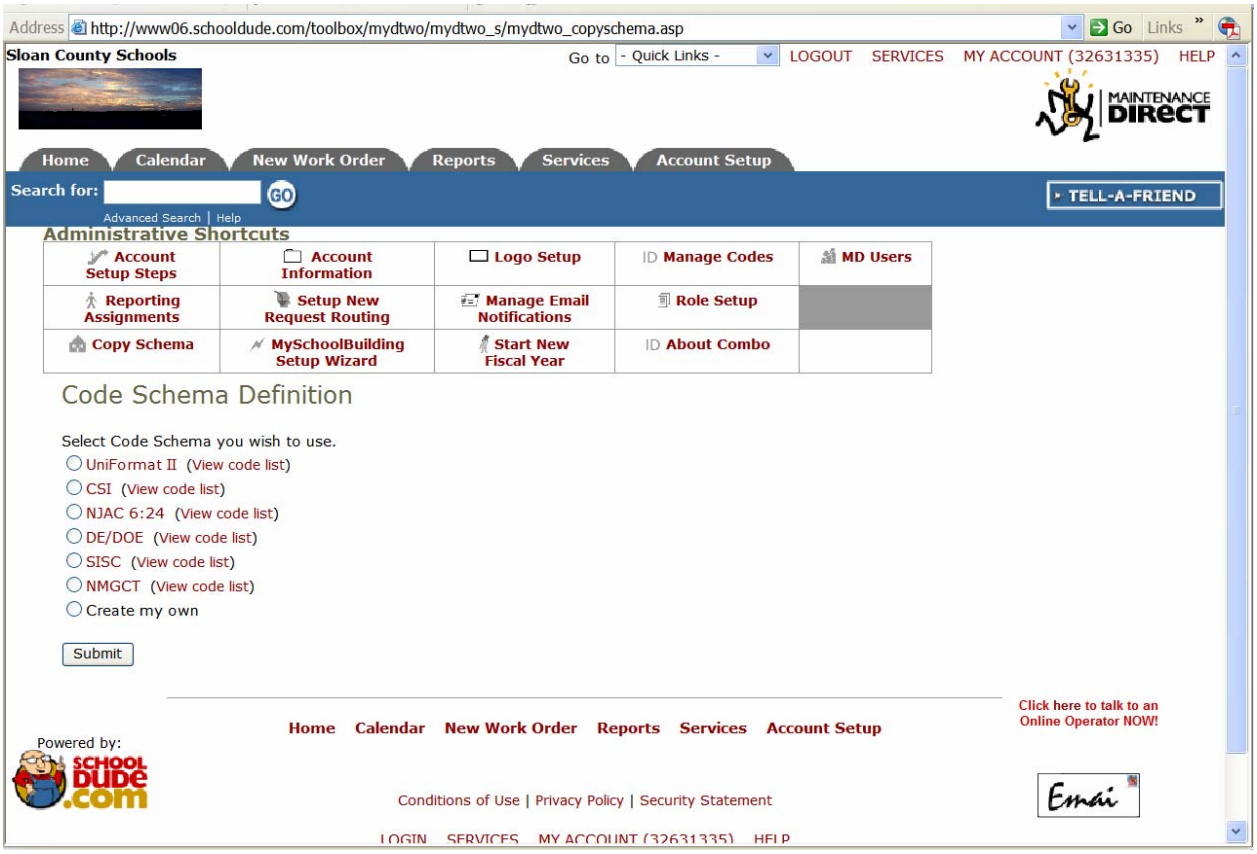
- Enter the Manufacturer's Department Name.
- Include the Department's address, phone number, fax, and any notes you wish to include, if available.
- Click Save.
- Then, click Next Step.
- Enter the Web Site information of the Manufacturer, including the Department, Web Site Description, and Web Site URL.
- Click Next Step.
- Define Contacts: Enter your contact information for this Manufacturer, including First and Last Name, Department, Phone, Fax, Email, etc.
- To add more contacts, click the Add button and repeat the last step.
- To finish up, click the Finish button.
- You will be taken back to the **My Manufacturers** page, which will show that your newest manufacturer has been added.

➢ To update manufacturer information, click on that manufacturer's name in the My Manufacturers list. Proceed through the steps above, making the desired changes to your manufacturer's information and click Submit when finished.

➢ To delete a manufacturer once it's been added and before any costs are tied to it, simply click on that manufacturer's name in the My Manufacturers list. In the first "New Manufacturer" step, click the Delete button at the bottom of the page, beneath the Notes field. A gray confirmation box will appear to make sure that you want to delete the manufacturer. Click OK. You will then be taken back to the **My Manufacturers** page, which will show that the manufacturer has been deleted.

SCHOOLDUDE SAYS: Keep in mind that you will **NOT** be able to delete a Manufacturer once you have costs associated with it.

21. Copy Schema: Below is a shot of the **Copy Schema** page:



This is the page that you fill out to copy your schema into your MaintenanceDirect account.

SCHOOLDUDE SAYS: **Once you copy a schema into your account, it will be difficult to undo so please make sure that you want that particular schema.**

If you choose to use a pre-defined schema, you can still add, modify, and delete to customize groups, classifications, and types. You will not be limited to the schema that is copied.

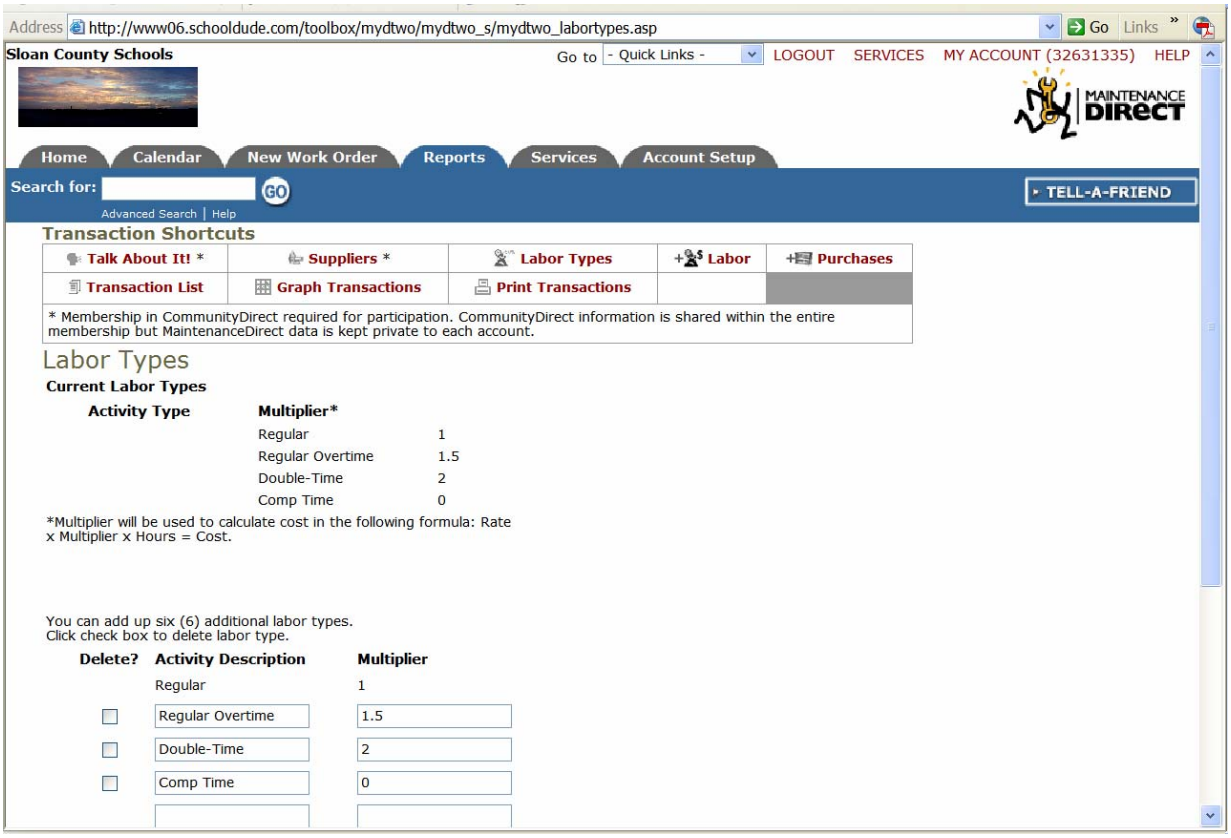
- To view an example of each schema, click on the View Code List link provided in parenthesis next to each Code Schema. **DON'T** click the empty buttons to the left of each Code Schema—click those only when you wish to select that schema for use.

- To copy a schema, click the empty button to the left of it and then click Submit.

22. Labor Types: Labor types are the multipliers that you use to calculate labor costs. The most common Labor Types and cost multipliers are provided for you, but you can add your own as needed.

To get started, follow these steps:

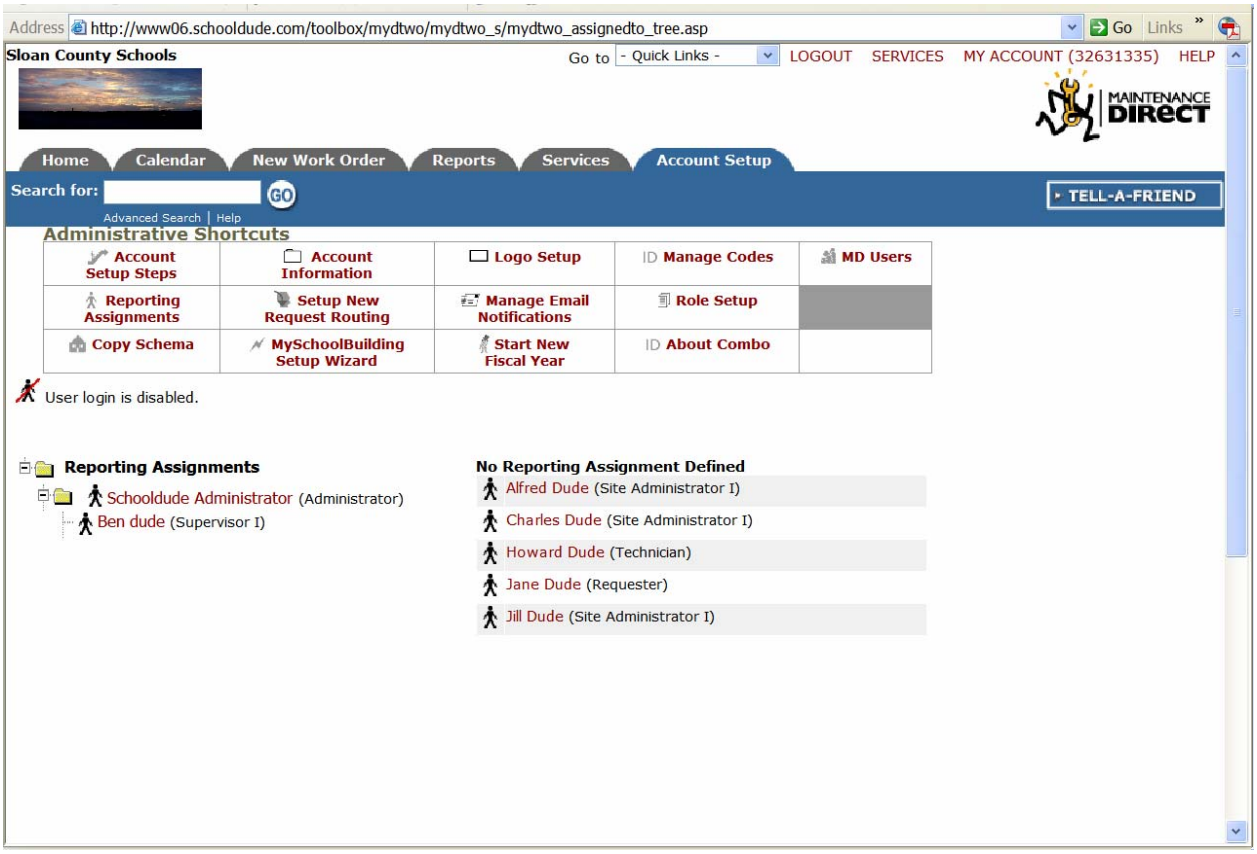
- Click the Labor Types link on the **Account Setup** page.
- You will be taken to the **Labor Types** page, which will look something like this:


Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_labortypes.asp
Go Links
Sloan County Schools
Go to - Quick Links -
LOGOUT SERVICES MY ACCOUNT (32631335) HELP
MAINTENANCE DIRECT
Home Calendar New Work Order Reports Services Account Setup
Search for: GO
Advanced Search | Help
TELL-A-FRIEND
Transaction Shortcuts
Talk About It! * Suppliers * Labor Types +Labor +Purchases
Transaction List Graph Transactions Print Transactions
* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.
Labor Types
Current Labor Types
Activity Type Multiplier*
Regular 1
Regular Overtime 1.5
Double-Time 2
Comp Time 0
*Multiplier will be used to calculate cost in the following formula: Rate x Multiplier x Hours = Cost.
You can add up six (6) additional labor types.
Click check box to delete labor type.
Delete? Activity Description Multiplier
Regular 1
Regular Overtime 1.5
Double-Time 2
Comp Time 0

- On the **Labor Types** page, you will see the current labor types listed: Regular, Regular Overtime, Double-Time, and Comp Time.
- Beneath those, you are given the option of deleting any of them. If you wish to do so, simply click the check-box next to the Labor Type you wish to delete, beneath the word "Delete?"
- If you wish to add a Labor Type, do so now by entering the description in the box provided, as well as the multiplier.

- When you have made the additions that you want and/or selected the Labor Types that you wish to delete, click the Save Changes button.

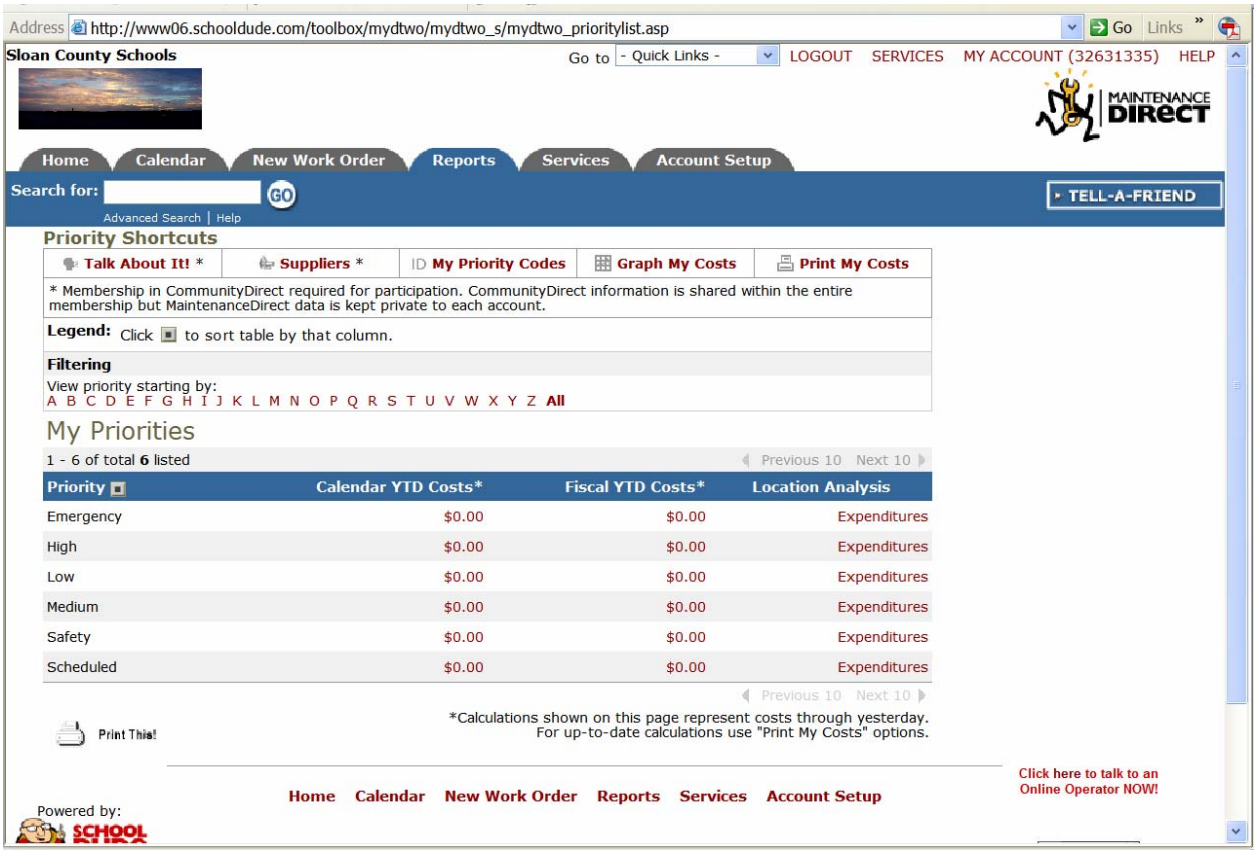
23. Reporting Assignments: Below is a shot of the **Reporting Assignments** page:



This page will display all users that have people who work below them that have direct reports. They will be listed in a "tree-type" format. Any user with a slash through their icon is a disabled user and they cannot log into the system.

Any users not reporting to anyone will be listed on the right-hand side. You can click on any user to take you to that person's participant information.

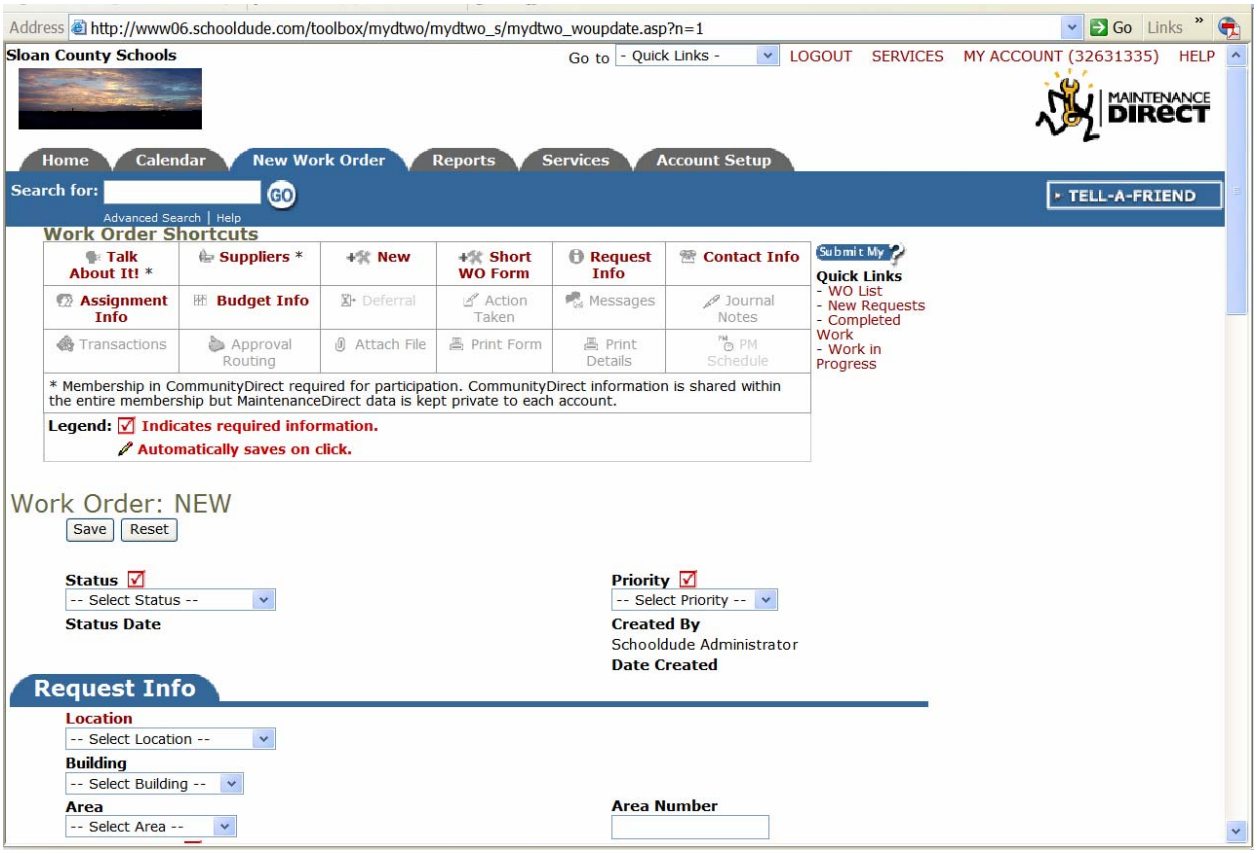
24. Priority: This page simply displays the different levels of priority in MaintenanceDirect, their Calendar YTD costs, Fiscal YTD costs, and Location Analysis, based on work orders requested and information entered into MaintenanceDirect over time.


Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_prioritylist.asp
Go Links
Sloan County Schools
Go to - Quick Links -
LOGOUT SERVICES MY ACCOUNT (32631335) HELP
MAINTENANCE DIRECT
Home Calendar New Work Order Reports Services Account Setup
Search for: GO
Advanced Search | Help
TELL-A-FRIEND
Priority Shortcuts
Talk About It! * Suppliers * My Priority Codes Graph My Costs Print My Costs
* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.
Legend: Click to sort table by that column.
Filtering
View priority starting by:
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All
My Priorities
1 - 6 of total 6 listed
Previous 10 Next 10
Priority
Calendar YTD Costs*
Fiscal YTD Costs*
Location Analysis
Emergency $0.00 $0.00 Expenditures
High $0.00 $0.00 Expenditures
Low $0.00 $0.00 Expenditures
Medium $0.00 $0.00 Expenditures
Safety $0.00 $0.00 Expenditures
Scheduled $0.00 $0.00 Expenditures
Previous 10 Next 10
Print This!
*Calculations shown on this page represent costs through yesterday.
For up-to-date calculations use "Print My Costs" options.
Home Calendar New Work Order Reports Services Account Setup
Click here to talk to an Online Operator NOW!
Powered by:
SCHOOL

Congratulations! Your Account Setup is complete. (Whew!)

III. Entering New Work Orders: MD in Action.

Now that you've got your account set up, we'll take a look at how to enter your own work orders. You'll go through the work order request process, step by step, so that you can not only see how it works, but also see where all the information that you entered during the Account Setup process comes into play. Below, you will see a shot of what the **New Work Order** page looks like, once you've clicked on the New Work Order tab at the top of your MaintenanceDirect page:


Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_woupdate.asp?n=1
Go Links
Sloan County Schools
Go to - Quick Links -
LOGOUT SERVICES MY ACCOUNT (32631335) HELP
MAINTENANCE DIRECT
Home Calendar New Work Order Reports Services Account Setup
Search for: GO
Advanced Search | Help
TELL-A-FRIEND
Work Order Shortcuts
Talk About It! * Suppliers * New Short WO Form Request Info Contact Info
Assignment Info Budget Info Deferral Action Taken Messages Journal Notes
Transactions Approval Routing Attach File Print Form Print Details PM Schedule
Submit My
Quick Links
- WO List
- New Requests
- Completed Work
- Work in Progress
* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.
Legend: Indicates required information.
Automatically saves on click.
Work Order: NEW
Save Reset
Status
-- Select Status --
Status Date
Priority
-- Select Priority --
Created By
Schooldude Administrator
Date Created
Request Info
Location
-- Select Location --
Building
-- Select Building --
Area
-- Select Area --
Area Number

As the Administrator of your account, you not only have the ability to create new work orders, you will also see every work order for your educational facility in the MaintenanceDirect system. You can make changes to them, update their status, and make sure they get where they need to go.

SCHOOLDUDE SAYS: Keep in mind that in MaintenanceDirect, work order ID numbers (WOID's) ALWAYS start with **100**.

To get started making a new work order of your own, follow the steps below, keeping in mind that ☑ indicates a required field:

- **Status**: Choose the status you would like from the drop-down box provided.

- **Priority**: Choose the priority of your work order (Low, Medium, High, Emergency, Safety, and Scheduled).

- **Status Date**, **Date Last Printed**, **Created By** and **Date Created** will all display in this section. **Status Date** is the date that the status was last changed. **Date Last Printed** is the date of the last time a printable version was created by our system. **Created By** lists the user who initially created the work order. **Date Created** is the date that the work order was initially created.

- **Request Info**: Enter your Location, Building, Area, Area Number, Request Date, and Request Description. If the priority selected for the work order was "emergency", the Emergency check box will show as already checked here.

- **Deferral**: If you would like to defer this work order until a later time, you may enter the New Due Date, Deferred By and the Deferral Reason in the corresponding fields provided. Fore example, you may receive a request to paint a room and you want to complete the work order over Spring Break, when no students will occupy the room. You can change the work order's status to "On Hold" and designate a reason under the **Deferral** section.

- **Contact Info. :** In this section, the person making the request should fill in their contact information in the fields provided (First Name, Last Name, Email, Phone, Pager, and Cell Phone). If this were a work order that you were receiving to approve, the requester's contact information would already be filled in, in this section.

- **Assignment Info.** : Select the user assigned to the work order from the drop-down box provided. If this is a new request and you are routing to the person for approval, check the Route for Approval or Review option.

- Enter the Target Start and Completion dates, as well as the Requested Completion Date and/or the Actual Completion Date.

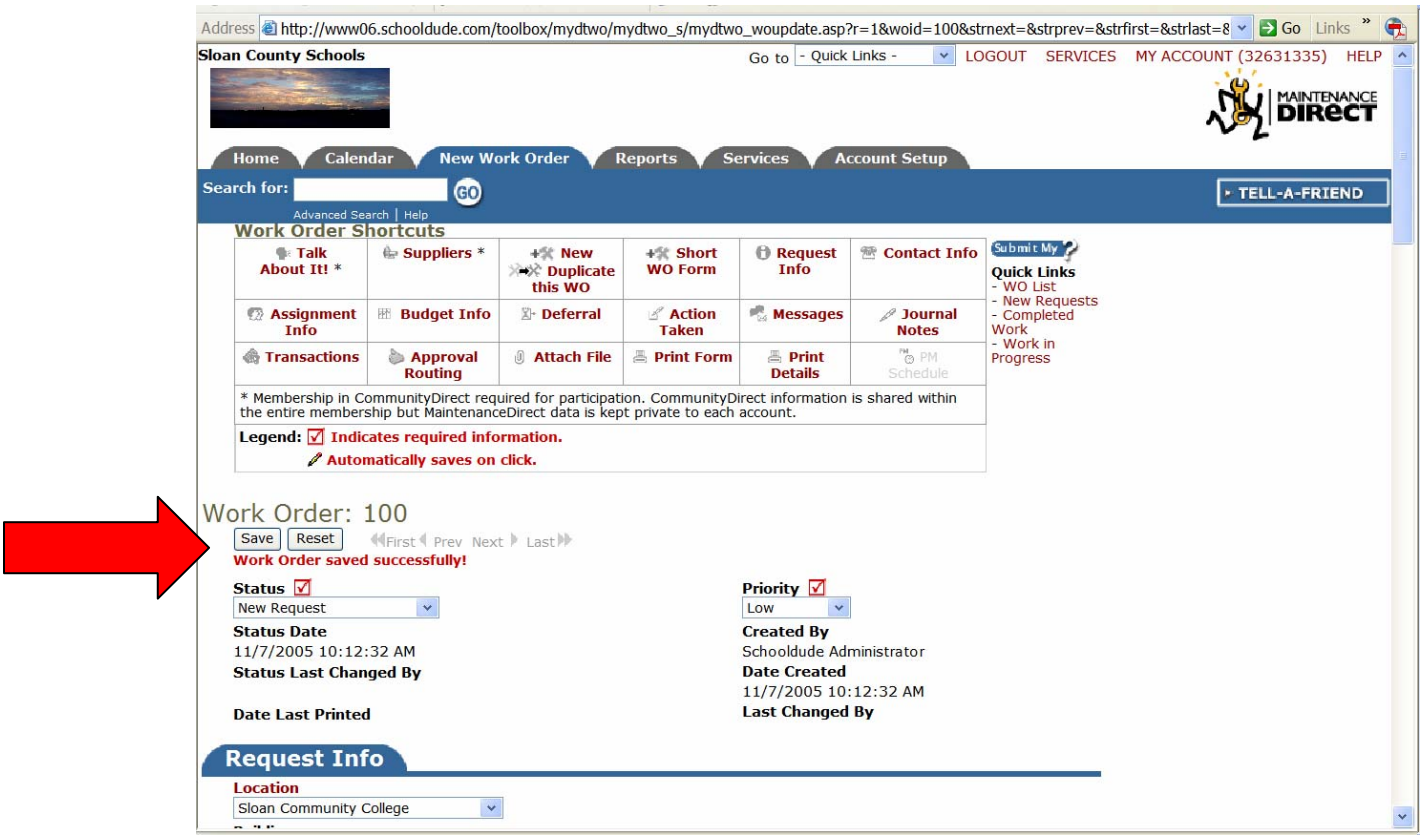
- Enter the Estimated Costs and Estimated Hours. As you enter transactions into the system, **Actual Costs**, **Actual Hours**, and **Total Costs** will display underneath for comparison.

- **Budget:** Choose the Purpose of the request from the drop-down box provided. The purpose is generally ***why*** you are performing the work order. For example, if it is a work order for removing graffiti from a wall, the purpose would be "vandalism".

- Choose the **Craft** for the request from the drop-down box provided.
- Select the **Budget Code**, **Custom Category**, and **Project** from their corresponding drop-down boxes.
- If this work order is to be performed using an item in the **Equipment** list, you can choose the item from the **Equipment** drop-down box. If this is a not a new work order but is a PM work order that you are approving, you will also see a **Classification** and **Type** selected.
- Click Save at the bottom of the page.

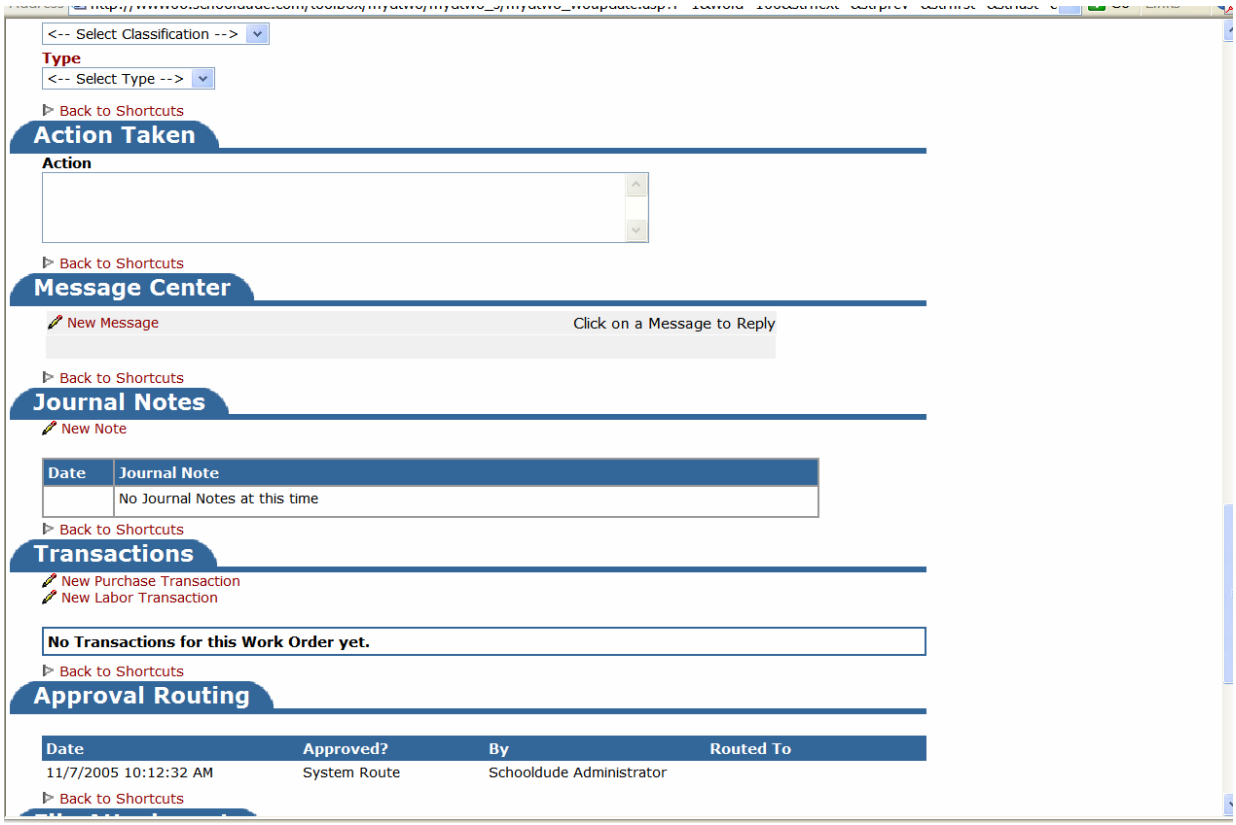
You're halfway there!

Once you click **Save**, the next page you see will look something like this:



The top half of the page will look just like the page you just filled out, only the words "Work Order Saved Successfully!" will appear in red, just under the new work order number (in this case, 100). See red arrow above.

To continue filling in further details for the work order, scroll about halfway down the page to the new section, which starts with **Action Taken**. It will look like this:



- If you are approving a work order that has been entered by a requester, enter the Action Taken for this work order here. The requester will then be able to view this information when checking the work order's status.

- **Message Center:** This section will allow you to send an email message regarding the work order to anyone in the system. It will also show email notifications sent out from our servers. To enter a new message, click the New Message link.

- **Journal Notes:** This section allows you to post journal notes regarding the work order. You also have the option of sending out a reminder email for the journal note. To create a new journal note, click the New Note link.

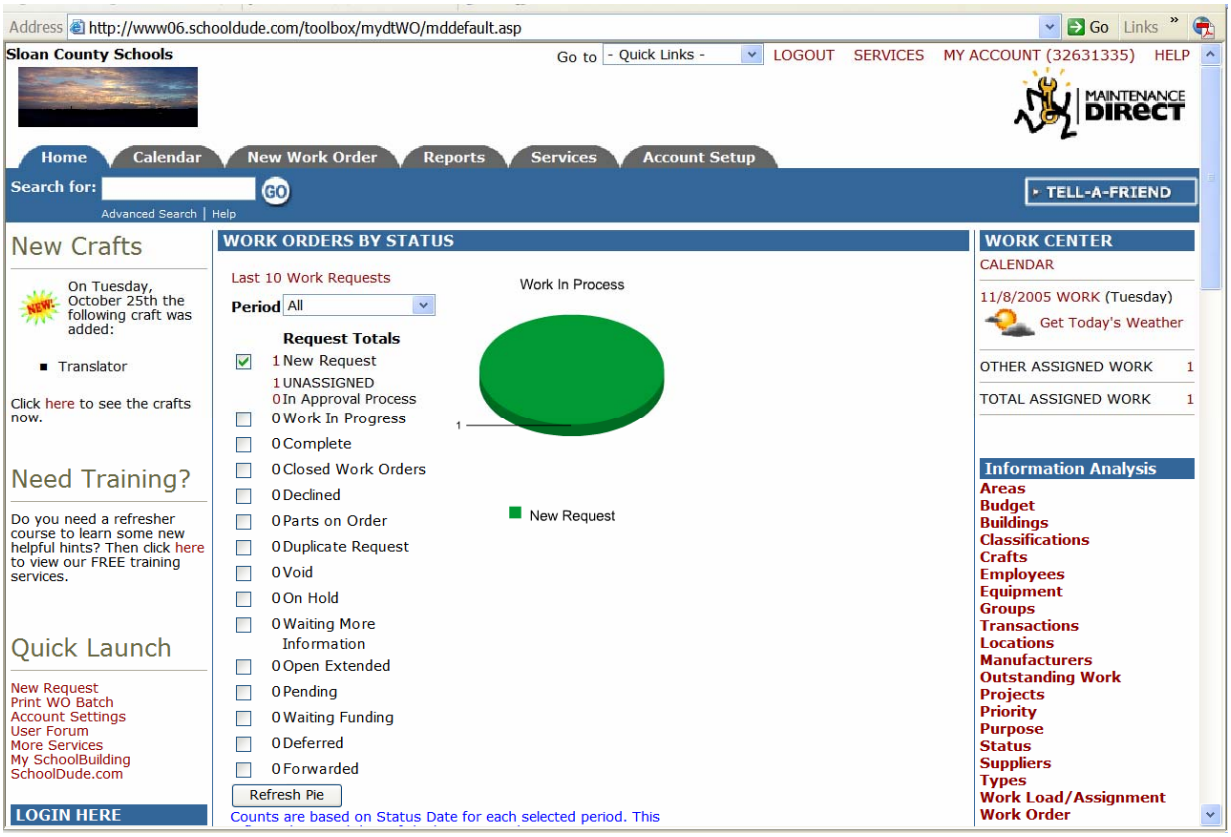
- **Transactions:** From this section, you can add and edit Labor and Purchase Transactions. If you have InventoryDirect, you will also be able to add and edit Issue Transactions. Transactions will be discussed in more detail in the next section of this manual.

- **Approval Routing:** This section displays all the routes the work order has taken for approval.

- **File Attachments:** You can attach up to two files to each work order. Keep in mind that they must be 3MB or less each.

- Click Save. Or, to clear the work order of all changes you just made, click Reset.

➢ Once your work order has been saved, it will show up in the **WORK ORDERS BY STATUS** section of the **Home** page. If this is your first work order, you will now see a pie graph displayed in this section of the **Home** page as well. See below:



➢ As work orders are added, edited, and routed, they will show up in the **WORK ORDERS BY STATUS** section of the **Home** page, based on their current status. To view work orders that hold a particular status, simply click on the number next to the status label you wish to view.

IV. Entering Labor and Purchase Transactions: How Much Was That Again?

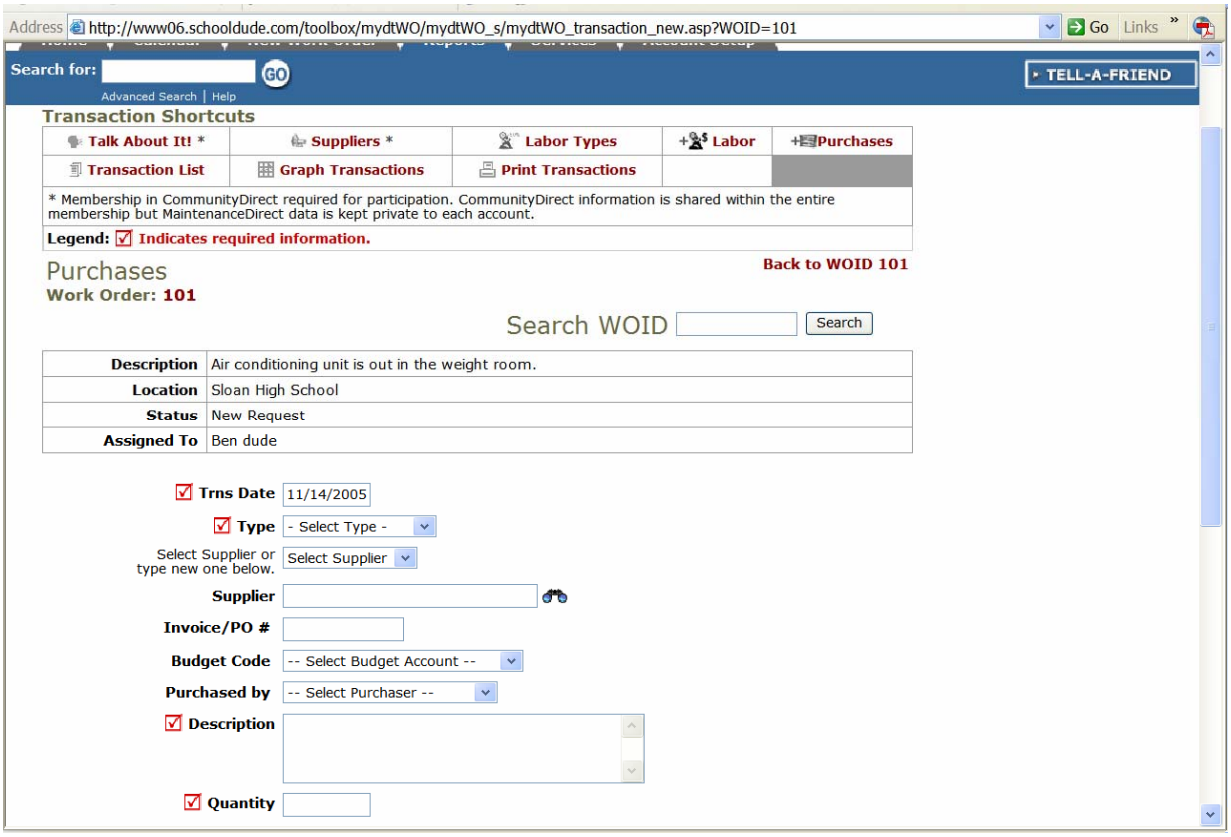
The cost of a work order comes from the labor and purchase transactions attached to it. To track those costs without having to chase down receipts, simply enter them into MaintenanceDirect as you get them and our system will organize them for you so that you'll always know exactly how much a work order costs and why. You've got all the answers.

In MaintenanceDirect, transactions can be entered in two ways. The first of those that you will mostly likely encounter will be the Transactions section of the work order itself. The second way is to use the link provided on the Home page itself. We'll cover each method separately in this section.

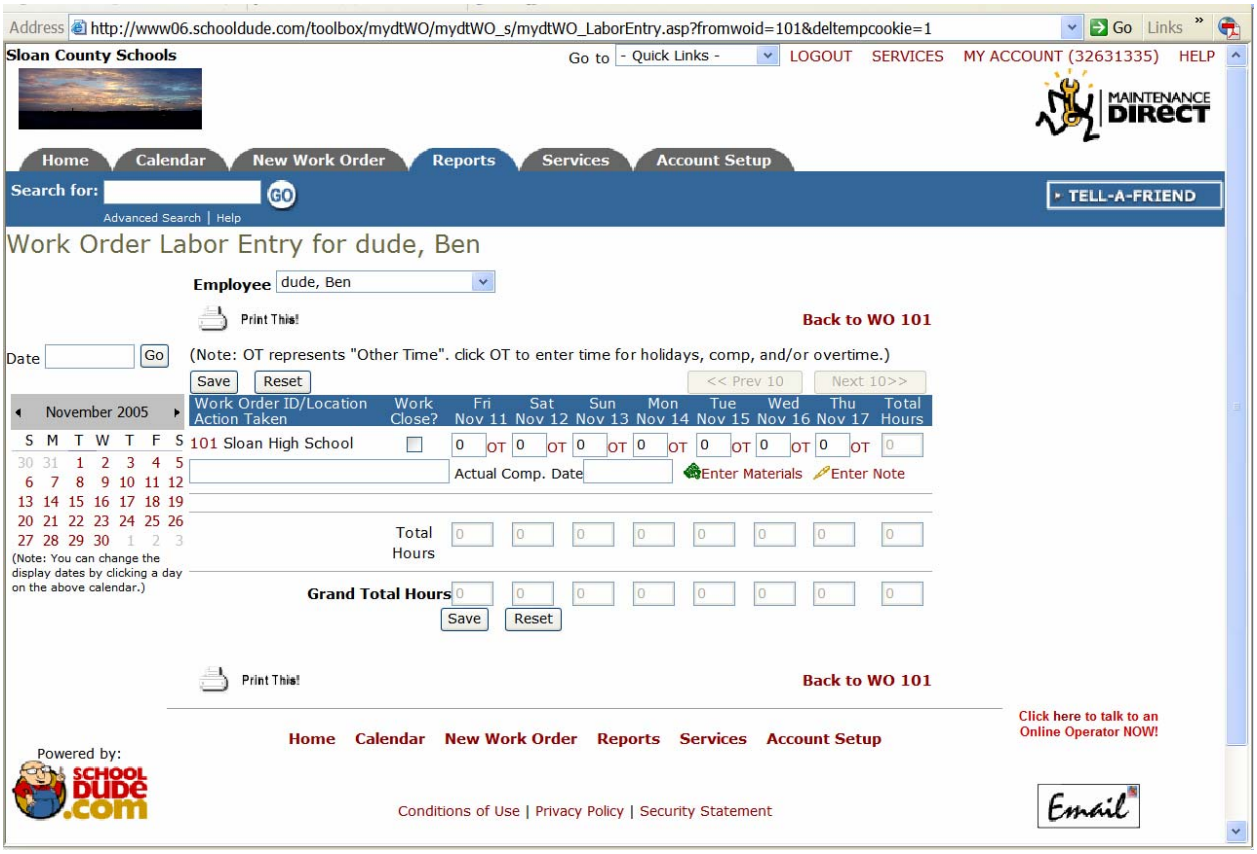
Method 1:

As you saw in the previous section, the second page of a work order contains a Transactions section where you can click one of two links:

Clicking on the New Purchase Transaction link on the work order form will take you to the following page where you can enter and save all of the purchase transaction information for the current work order. See below:



Clicking on the New Labor Transaction link on the work order form will take you to the following page, where you can enter and save labor transaction information for this particular work order. See below:


Address http://www06.schooldude.com/toolbox/mydtWO/mydtWO_s/mydtWO_LaborEntry.asp?fromwoid=101&deltempcookie=1
Go Links
Sloan County Schools
Go to - Quick Links - LOGOUT SERVICES MY ACCOUNT (32631335) HELP
MAINTENANCE DIRECT
Home Calendar New Work Order Reports Services Account Setup
Search for: GO
Advanced Search | Help
TELL-A-FRIEND
Work Order Labor Entry for dude, Ben
Employee dude, Ben
Print This!
Back to WO 101
Date Go
(Note: OT represents "Other Time". click OT to enter time for holidays, comp, and/or overtime.)
Save Reset
<< Prev 10
Next 10>>
November 2005
S M T W T F S
30 31 1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 1 2 3
(Note: You can change the display dates by clicking a day on the above calendar.)
Work Order ID/Location Action Taken
Work Close?
Fri Nov 11
Sat Nov 12
Sun Nov 13
Mon Nov 14
Tue Nov 15
Wed Nov 16
Thu Nov 17
Total Hours
101 Sloan High School
OT
Actual Comp. Date
Enter Materials
Enter Note
Total Hours
Grand Total Hours
Save Reset
Print This!
Back to WO 101
Click here to talk to an Online Operator NOW!
Home Calendar New Work Order Reports Services Account Setup
Powered by:
SCHOOL DUDE .com
Conditions of Use | Privacy Policy | Security Statement
Email

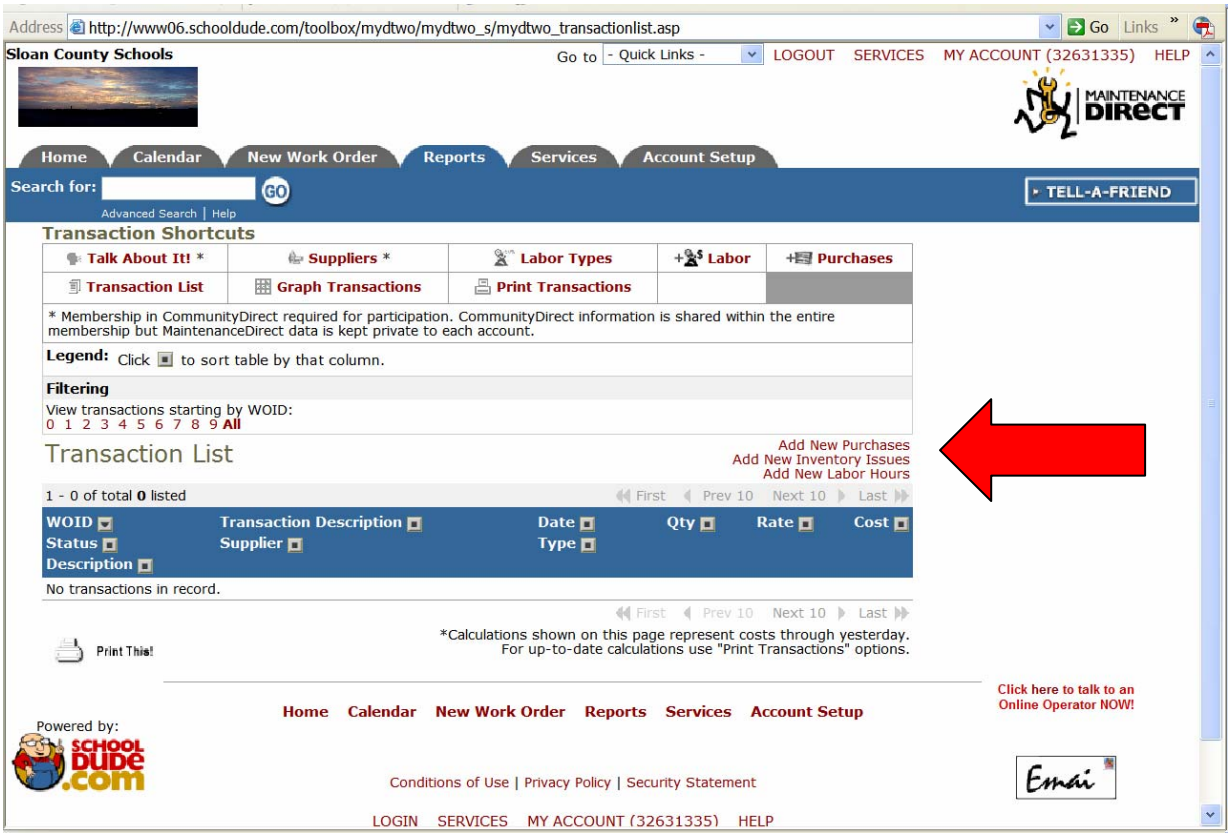
- If you need to account for overtime, comp time, holiday time, or any other time, you can click on OT ("Other Time") next to the corresponding date. A window will appear for you to enter in any other times.

Method 2:

The second way to enter purchase and labor transactions into MaintenanceDirect is through the link provided on the **Home** page. This method would probably be most useful to someone in the clerk role who may be entering purchase transactions by going through a stack or list of invoices. It provides a faster, more streamlined way to enter transactions into MaintenanceDirect.

To get started, take a look at the **Information Analysis** section of the **Home** page. As was mentioned earlier in the **Home** page discussion at the beginning of this manual, the **Information Analysis** section is a quick source for locating and managing all the information pertaining to work orders within MaintenanceDirect.
To work within Transactions, click on the Transactions link here.

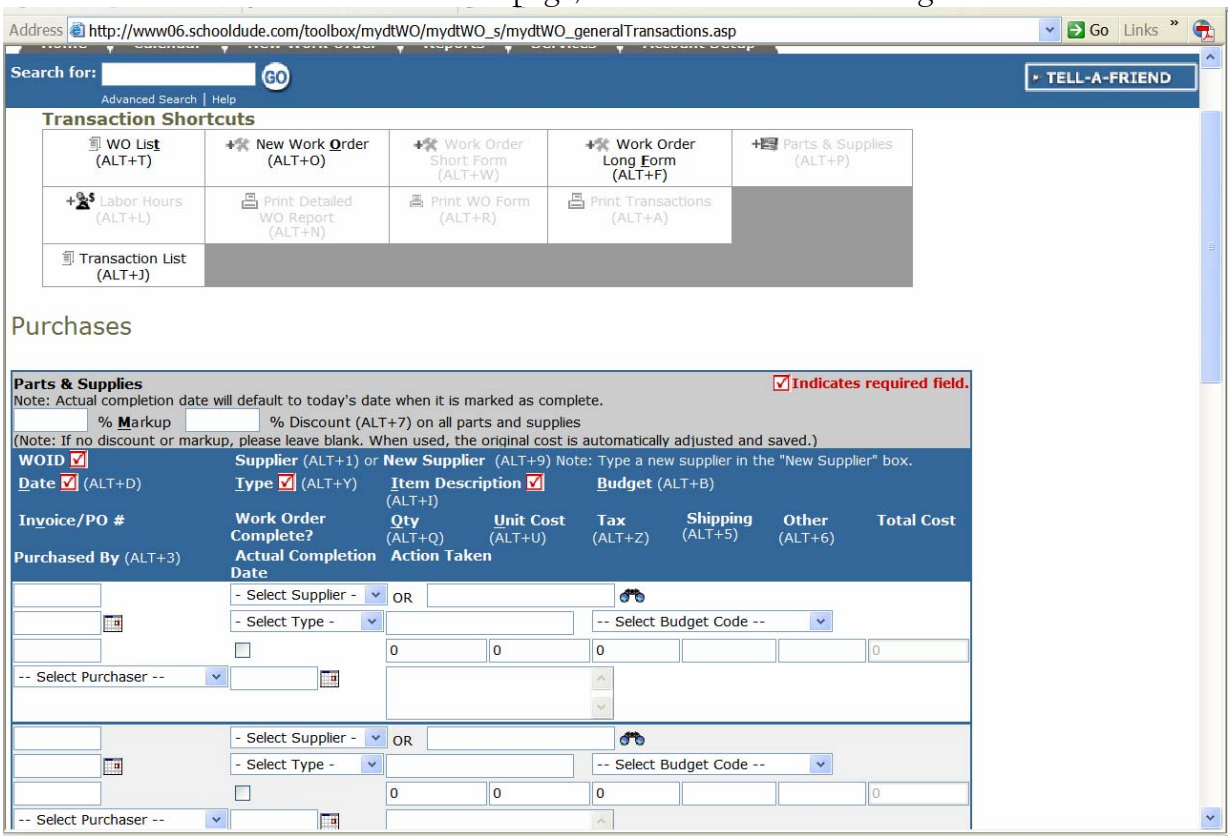
The **Transactions** page will look something like this the first time you visit:



New Purchases: (Keep in mind that ☑ = required field.)

- Click on the Add New Purchases link on the **Transaction List** page, located on the right-hand side (see arrow above).

You will be taken to the **Purchases** page, which will look something like this:



- As you can see by scrolling down this page, you can add multiple purchases at a time by filling in the information for each separate purchase in the fields provided.

- ☑ **WOID = Work Order ID**: Enter the work order number here to indicate which work order that this purchase pertains to.

- ☑ **Date**: Enter the date that the purchase was made.

- Enter the **Invoice/PO Number**.

- **Purchased By:** Select the name of the person who made the purchase from the drop-down box provided.

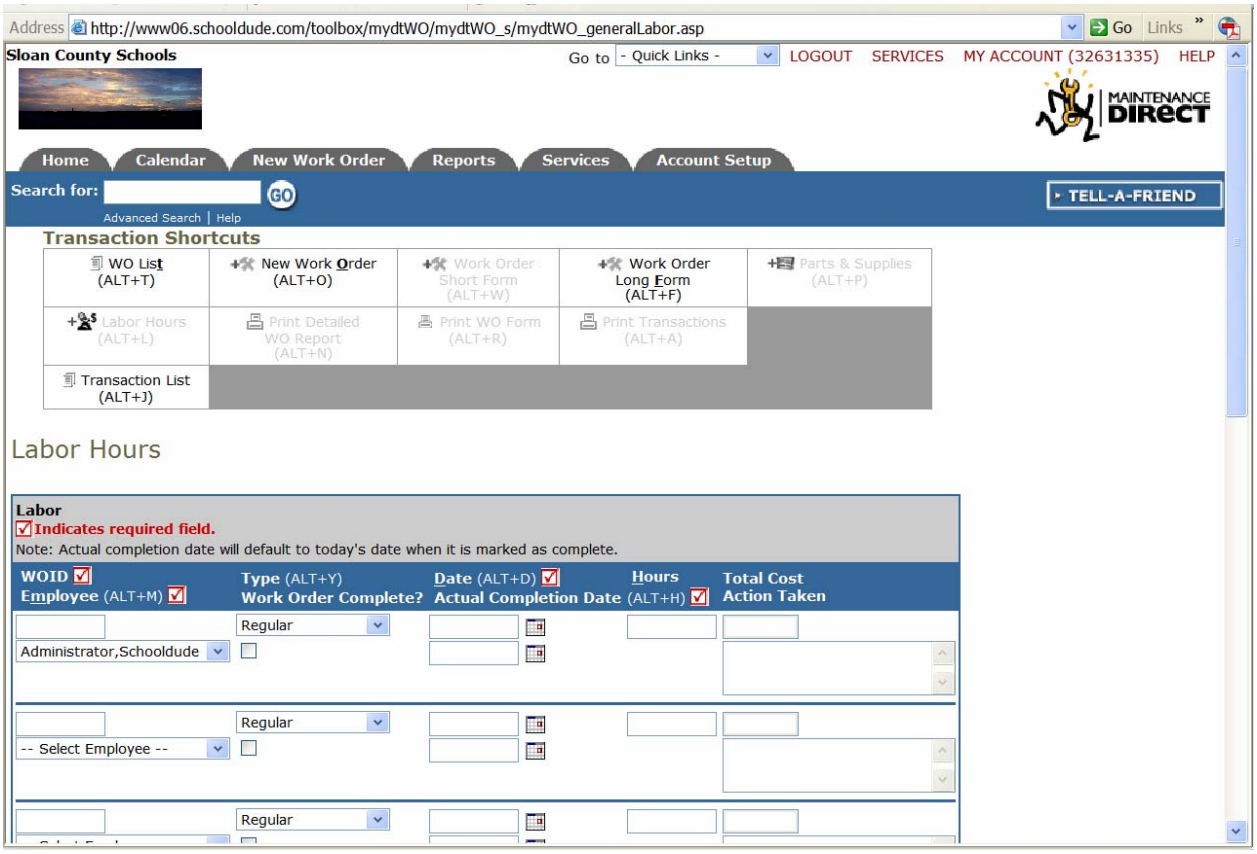
- Select the **Supplier** from the drop-down box provided OR enter a **New Supplier**.

- ☑ Select the **Type**.
- **Work Order Complete?** : Indicate whether or not the work order is complete using the check-box provided.
- **Actual Completion Date**
- ☑ **Item Description**
- **Quantity**
- **Action Taken**
- **Budget**
- **Unit Cost**
- **Tax**
- **Shipping**
- **Other**
- **Total Cost**
- Click Save.

➢ After you've entered your purchase information, purchases will show listed in the **Purchases** section at the bottom of this page.

Labor Hours:

- Click on the Add Labor Hours link on the **Transactions** page.
- You will be taken to the **Labor Hours** page, which will look like this:



- As you can see by scrolling down this page, you can add multiple labor transactions at a time by filling in the information for each in the fields provided.
- ☑ **WOID:** Enter the work order ID number here to indicate which work order that this labor pertains to.
- ☑ **Employee:** Indicate here, by selecting from the drop-down box provided, which employee performed this labor.
- Type
- Work Order Complete?
- ☑ Date
- ☑ Actual Completion Date

- Hours
- Total Cost
- Action Taken

V. Processing and Assigning New Requests: Any Volunteers?

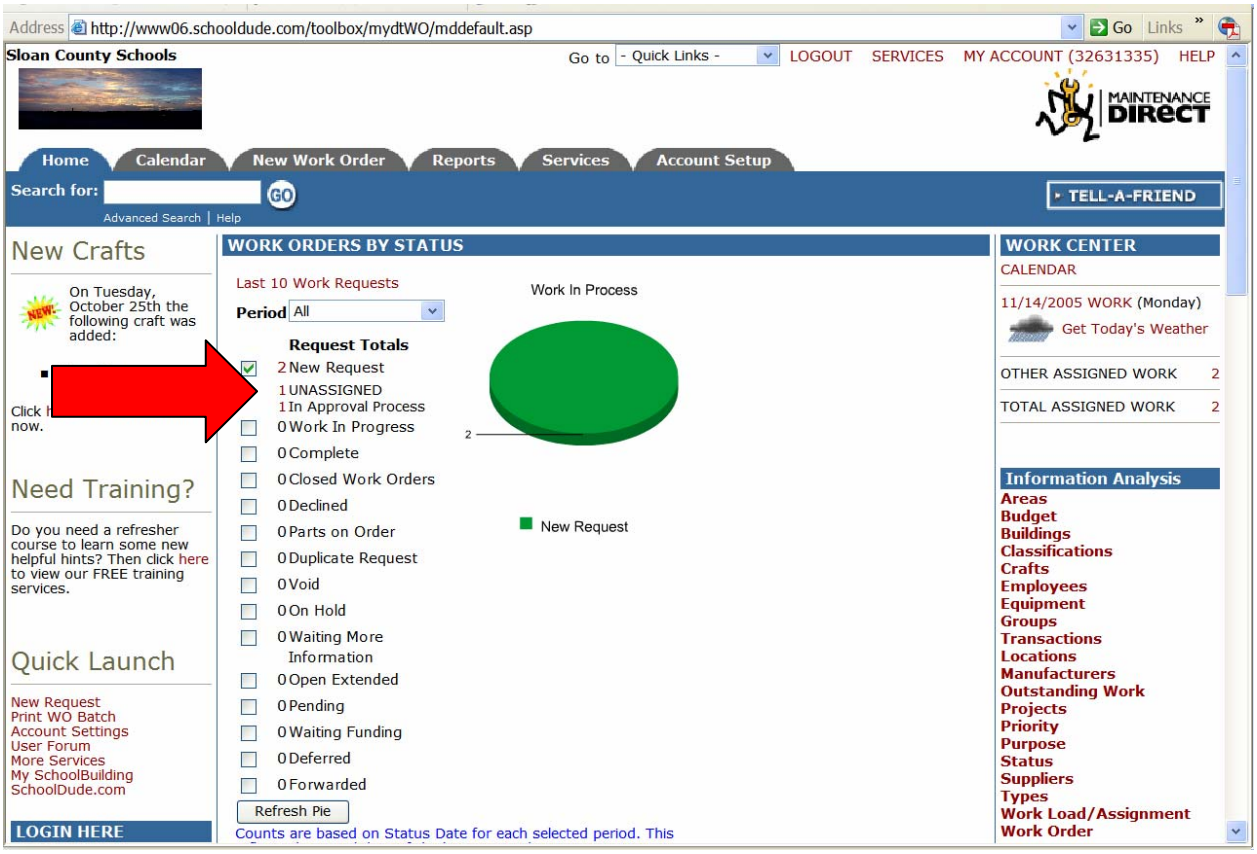
As you've learned, when someone makes a work order request, the initial status of the request is "New Request". New Requests have two subcategories: "Unassigned" and "In Approval Process" (the numbers next to these on the Home page don't necessarily have to add up to the number next to "New Requests"). Unassigned work orders, which can be viewed in the **WORK ORDERS BY STATUS** section of your **Home** page (see screen shot below), are just what you think—those with no assignment at all. However, they can also be those that are assigned to you to be reassigned.

Any work order that is "In Approval Process" has been routed to another user for approval so you don't have to worry about it at this point.

SCHOOLDUDE SAYS: Clicking on the number next to "New Requests" will **NOT** take you to the **Work Order Summary List** (which shows all work orders in handy-dandy list format). Instead, it will take you to the work order form of the **OLDEST** of the New Requests that have been entered. In order to reach each of the New Requests at this point, you will have to click on the Unprocessed New Requests drop-down box provided and select the New Request you wish to view from the list that will drop down.

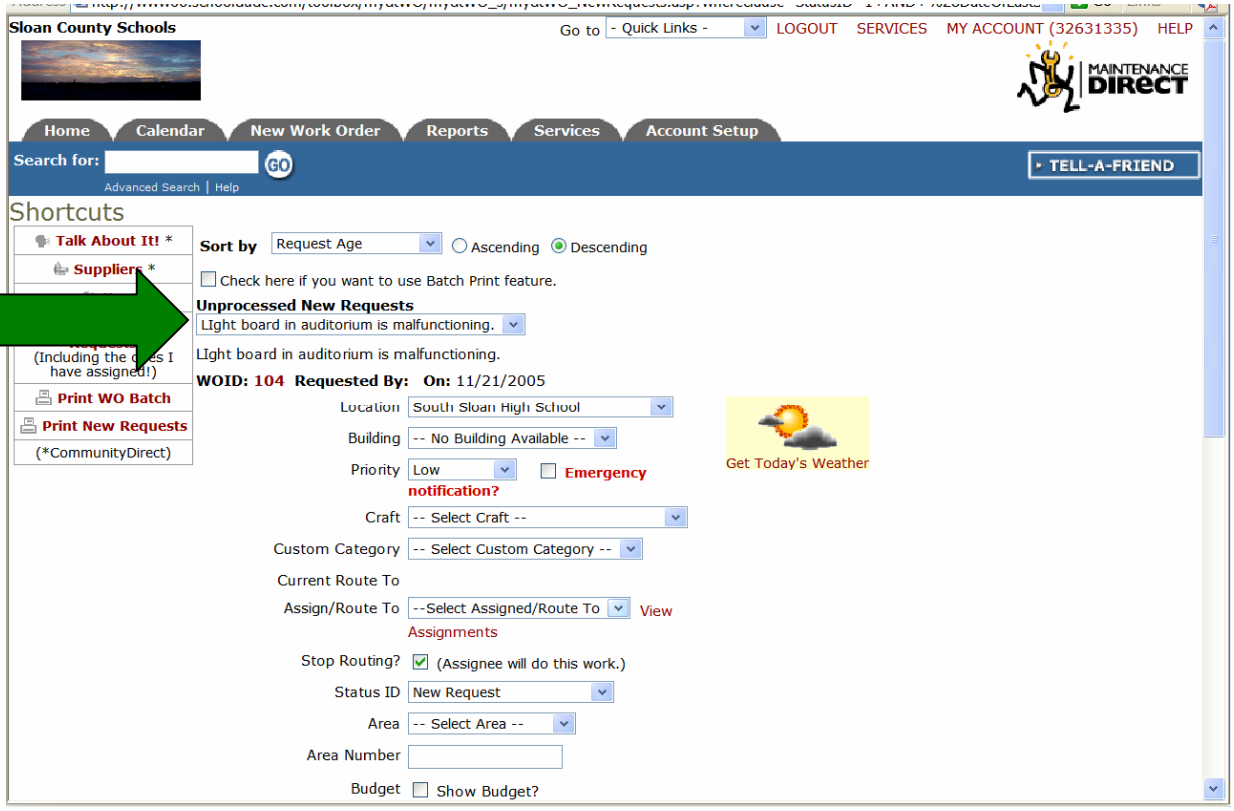
SCHOOLDUDE SAYS: A New Request's status determines whether or not you can or should deal with it at this point. In other words, if it's "In Approval Process", it has currently been routed to another user for approval and therefore, isn't yours to deal with yet. If it's "Unassigned", however, you can go ahead and process it, assigning it to whoever needs to handle it at the time. For this reason, we recommend avoiding clicking on the number next to "New Requests". Instead, go straight to "Unassigned" to handle those work orders that need direction.

To process your new (unprocessed) requests and assign those that are unassigned, do the following from the **Home** page:



- Click on the number next to "UNASSIGNED" on the **Home** page (see red arrow above).

- This will take you directly to the work order form of the oldest unprocessed work order in the system. At this point, you can either go ahead and handle this particular work order now, or you can choose another of the unprocessed work orders to process from the Unprocessed New Requests dropdown box, provided near the very top of the work order form (see green arrow on next page).



- On the work order form, you can view the details of the work order and make any changes you wish to make. You can also scroll down to the "Assign/Route To" field and choose a name from the drop-down box provided. Include any notes you wish to make.

- For your convenience, here is a list of all the fields you will find on the work order: **WOID**, **Requested By and On**, **Location**, **Building**, **Priority**, **Emergency Notification**, **Craft**, **Custom Category**, **Current Route To**, **Assign/Route To**, **Stop Routing**, **Status ID**, **Area**, **Area Number**, **Budget**, **Purpose**, **Project**, **Don't Prompt For Status Change**, **Estimated State and Completion Dates**, **Estimated Hours and Costs**, **Action Taken**, and **Note(s)**.

- Depending on what you'd like to do, continue by choosing one of the steps below:

  - To save this work order and any changes you have made to it, click the Submit button. A prompt will display (unless you've turned it off) which will notify you that the status will change to "Work in Progress". Click OK, unless you would like it to keep the status of "New Request". If this is the case, click Cancel.

- Once you've processed all the work orders, you will see a notification that there are "No More New Requests to Process".

- To save and print out a copy of this work order, click the Submit and Print button. You will see a prompt (unless you've turned it off) to change the status to "Work in Progress". Click OK if you would like to make this change or Cancel if you would like to keep the status of "New Request". A page will come up with a printable version or the work order form. Print the form using the print function on your browser. Once the work order is printed, close the print window. The work order listing will be refreshed and the next work order in your list should appear ready to process.

- To clear the form of all of your changes, click the Reset button.

VI. Searching For Work Orders: The Information You Want When You Want It.

So you've learned how to create work orders, how to process work orders, and how to assign new work orders. The next step is to learn how to search for work orders that have been entered into the system. That way, you can find exactly what you need, when you need it.

To get started, let's take a look at the different types of searches that you can perform within MaintenanceDirect and then check them out, one by one:

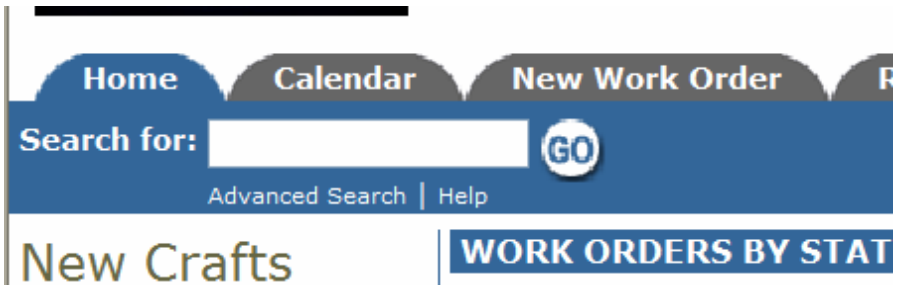
1. Search
2. Advanced Search
3. Work Order by Status list
4. Last 10 Work Requests list

1. Search: This is the simplest search that you can perform. You can search for work orders using the search text box, located in the blue bar near the top, left-hand side of every page. See below:

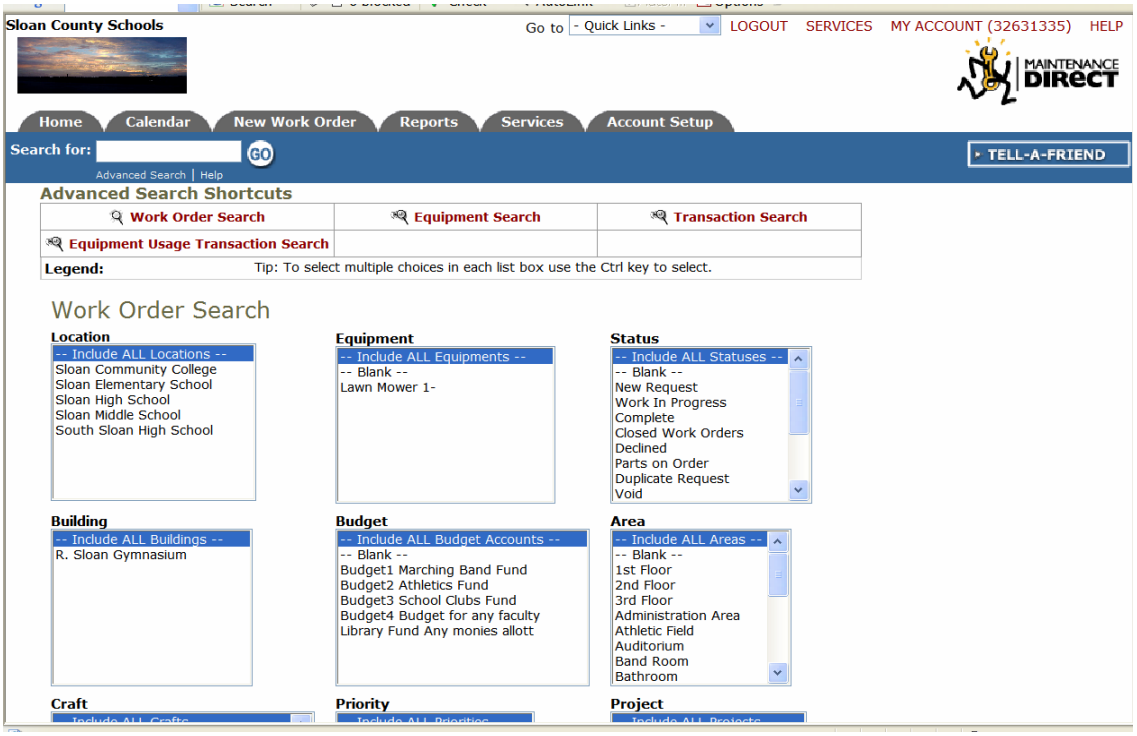
In this box, you can enter a work order number or a key word and click Go to search for the work order or information that you need.

For example, if you wanted to find work order #180, you would simply type "180" into the search box and click Go. That would then pull up the update page for that particular work order. If there is more than one work order which references work order #180, you would then see a listing of all matching work orders.

2. Advanced Search: Underneath the search field discussed above, you will see a link that says "Advanced Search":



Clicking on this link will take you to the **Work Order Search** page, which will look something like this:



You should see all of the information that you entered during the Account Setup process, as far as the names of Locations, Buildings, Crafts, Purpose, Assigned To, Equipment, Budgets, Priority, Requested By, Status, Area, Project, and Custom Category.

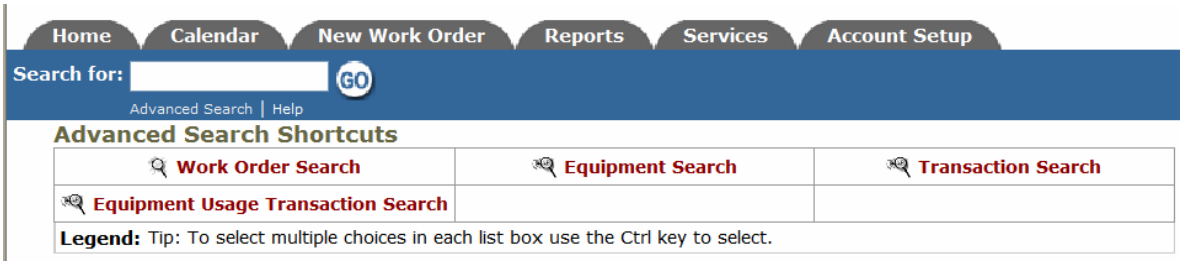
On this page, you may choose any combination of search options from the listings and fields provided. Enter your options and click the Search Now button.

An example would be if you would like to search for all work orders with the status of "Work In Progress" for "Sloan High School" requested in September of 2003. In this case, you would choose "Sloan High School" from the Location list and "Work In Progress" from the Status list. In the request date fields, you would type "9/1/2003" to

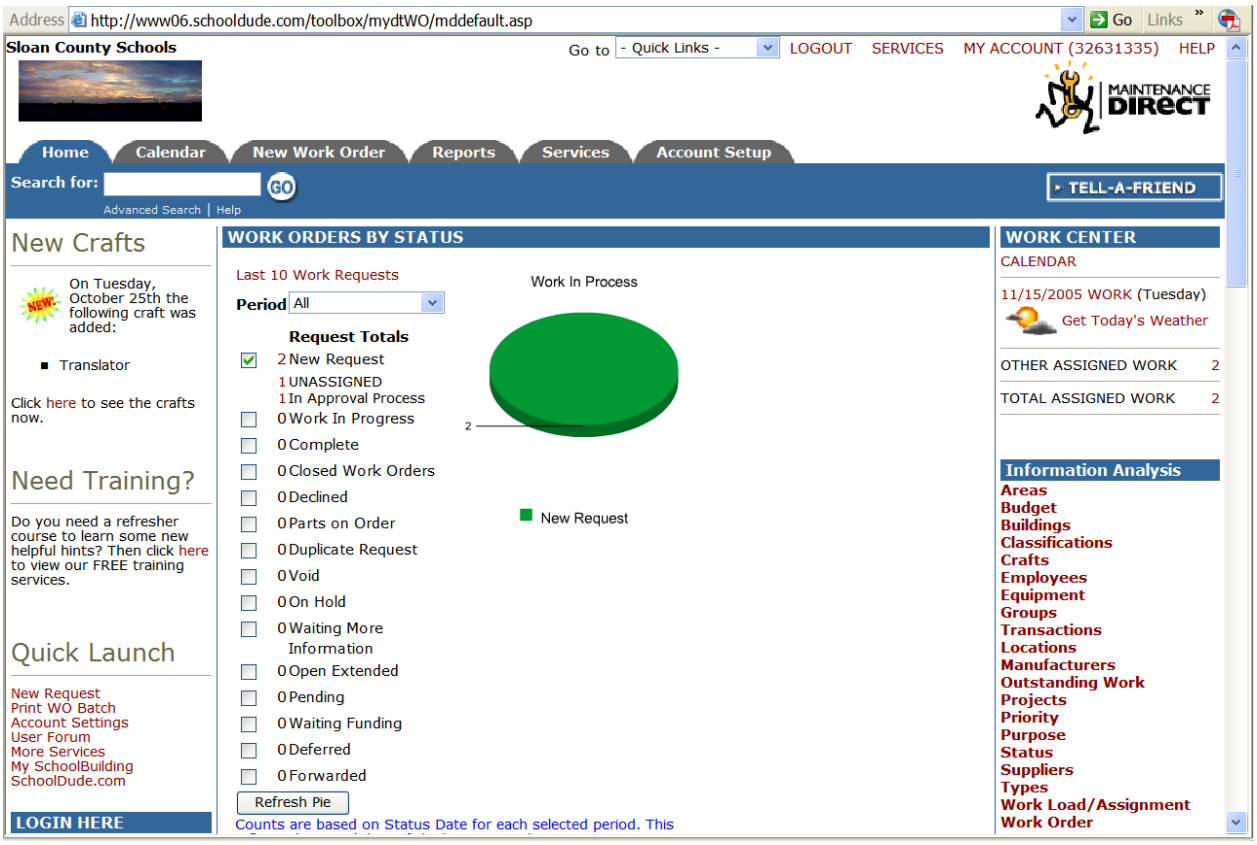
"9/30/2003" and then click Search Now. A list of all work orders that meet those particular criteria would appear. If there was only one work order to meet those criteria, the work order update page for that work order would appear instead of the list.

- To print out the results list, click on the Print This icon at the bottom of the results page. To print out a single work order, click on the printer icon ( ) next to the corresponding work order.
- To view a specific work order, click on the work order ID or the description.
- If you would like to send an email to the requester, click on the requester name to send an email via your email system (your browser and email must be configured to use "mail to" links).

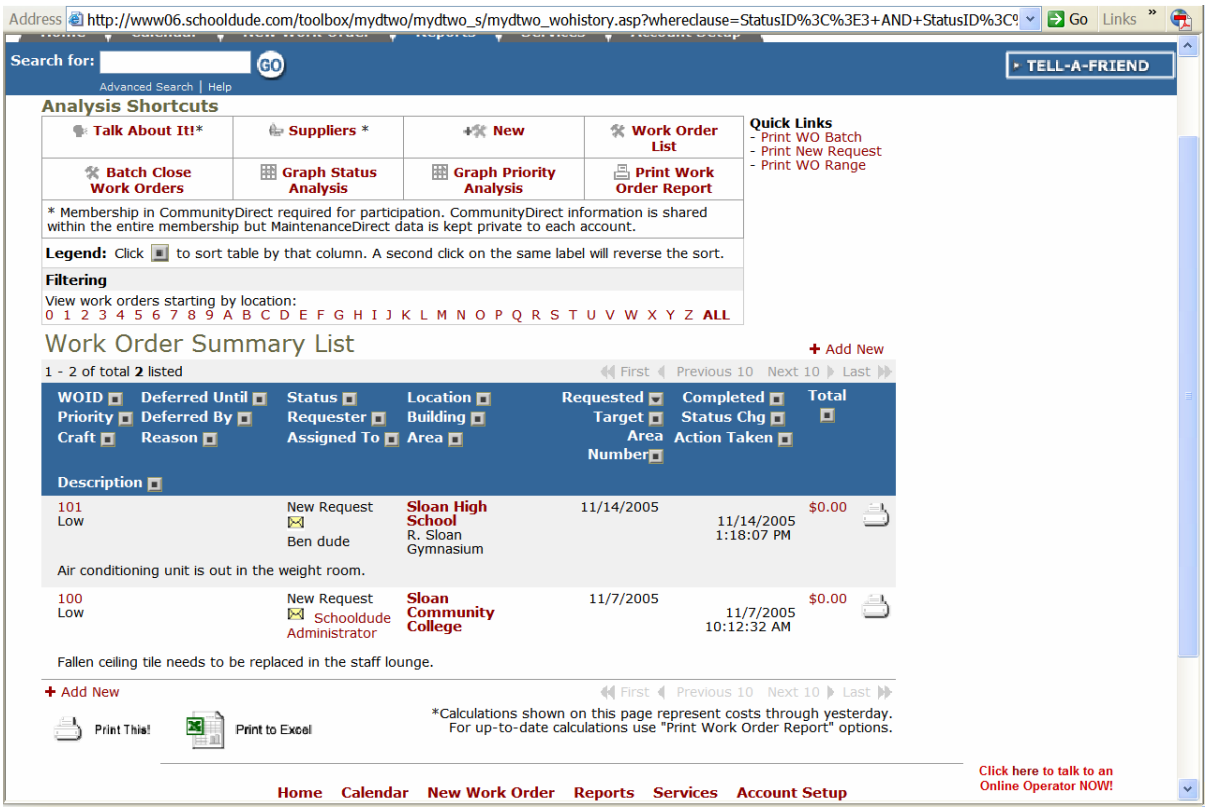
SCHOOLDUDE SAYS: Narrow your Advanced Search criteria by choosing one of the shortcuts near the top of the screen, based on what information you're looking for: Work Order Search, Equipment Search, Transaction Search, or Equipment Usage Transaction Search:



3. **Work Order by Status List:** You can view all work orders in a particular status by clicking on the number next to the particular status you wish to view. You can edit the time period that is displayed in the section by selecting a new period from the drop-down box. The screen will then automatically refresh. See the **Work Orders By Status** list below:



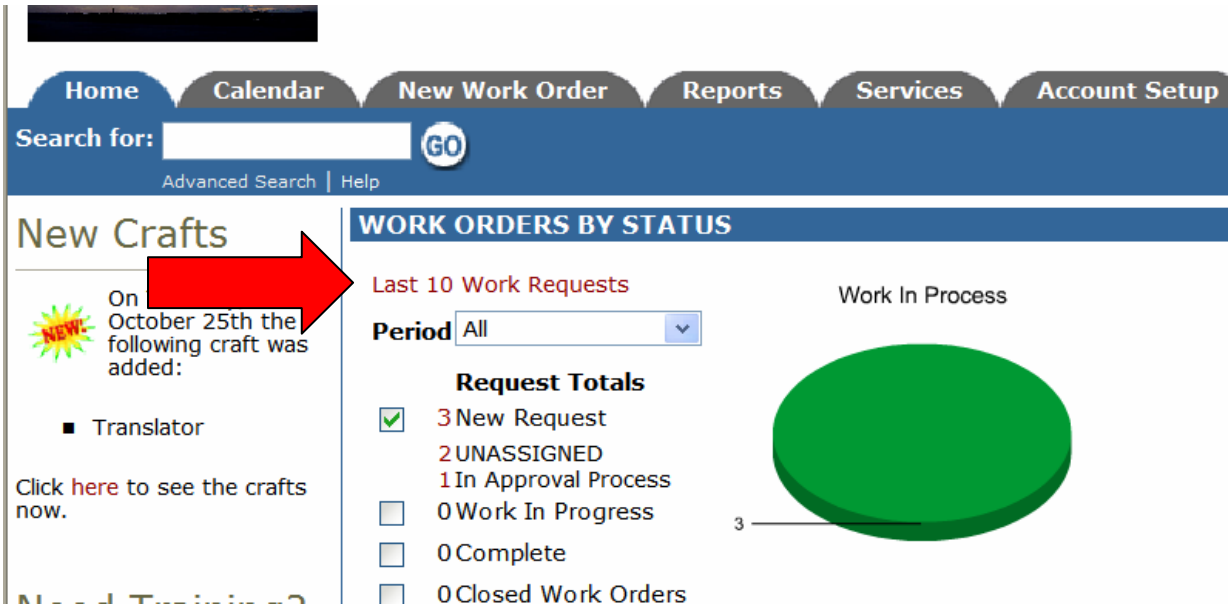
Once you choose a period and click a number next to a particular status, a list of all work orders for that status in the specified time period will display in the Work Order Summary list. You can sort this list by any of the fields listed by clicking on the field name to sort by descending order or clicking again to sort by ascending order. The default sort is by "request date".


Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_wohistory.asp?whereclause=StatusID%3C%3E3+AND+StatusID%3C
Go
Links
Search for:
GO
Advanced Search | Help
TELL-A-FRIEND
Analysis Shortcuts
Talk About It!*
Suppliers *
New
Work Order List
Batch Close Work Orders
Graph Status Analysis
Graph Priority Analysis
Print Work Order Report
Quick Links
- Print WO Batch
- Print New Request
- Print WO Range
* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.
Legend: Click to sort table by that column. A second click on the same label will reverse the sort.
Filtering
View work orders starting by location:
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL
Work Order Summary List
+ Add New
1 - 2 of total 2 listed
First Previous 10 Next 10 Last
WOID Deferred Until Status Location Requested Completed Total
Priority Deferred By Requester Building Target Status Chg
Craft Reason Assigned To Area Area Number Action Taken
Description
101
Low
New Request
Ben dude
Sloan High School
R. Sloan Gymnasium
11/14/2005
11/14/2005 1:18:07 PM
$0.00
Air conditioning unit is out in the weight room.
100
Low
New Request
Schooldude Administrator
Sloan Community College
11/7/2005
11/7/2005 10:12:32 AM
$0.00
Fallen ceiling tile needs to be replaced in the staff lounge.
+ Add New
First Previous 10 Next 10 Last
Print This!
Print to Excel
*Calculations shown on this page represent costs through yesterday.
For up-to-date calculations use "Print Work Order Report" options.
Click here to talk to an Online Operator NOW!
Home Calendar New Work Order Reports Services Account Setup

SCHOOLDUDE SAYS: Keep in mind that clicking on any of the three numbers beside the three categories of "New Requests" ("New Request", "Unassigned", or "In Approval Process") won't take you to the **Outstanding Work Orders** list, but will take you instead to the work order form of the oldest work order in the system for that particular status. You can then scroll to each work order in that status by using the **Unprocessed New Requests** drop-down box provided.

- To view all the details of the work orders, click on the work order ID number (WOID).
- To send an email to the requester of the work order, click on that requester's name.
- To view the details of the location of the work order, click on the location.

4. Last 10 Work Requests List: You can view the last ten work orders requested by clicking on the Last 10 Work Requests link, just below the words "**Work Order By Status**" on the **Home** page. See below:



This will take you to the **Work Order Summary List** page, where you will see the last ten requests listed.

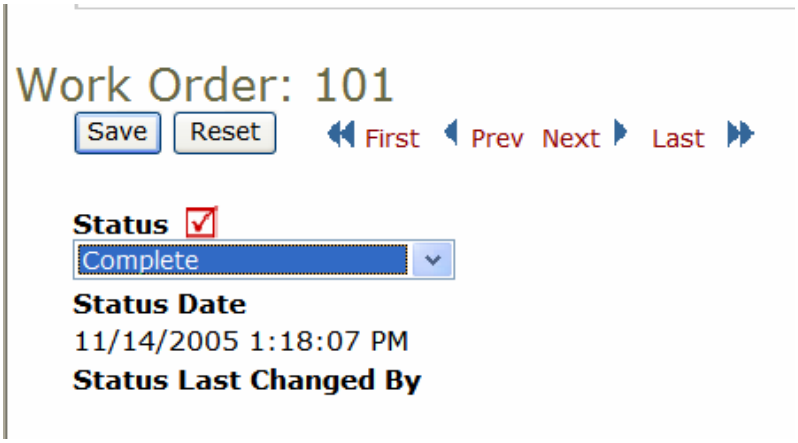
- To view all the details of the work orders, click on the work order ID number (WOID).
- To send an email to the requester of the work order, click on that requester's name.
- To view the details of the location of the work order, click on the location.

VII. Completing/Closing Work Orders: When It's Time to Move On.

Work orders can be designated as "Complete" or "Closed Work Order". Generally, if the actual work for the work order is done, you would mark it as "complete" because you may still have labor hours or purchase transactions to add to the work order. Once you add all transactions, however, you would then "close" the work order. Once a work order is closed, you cannot add any other transactions; in order to add transactions, you would need to re-open the work order.

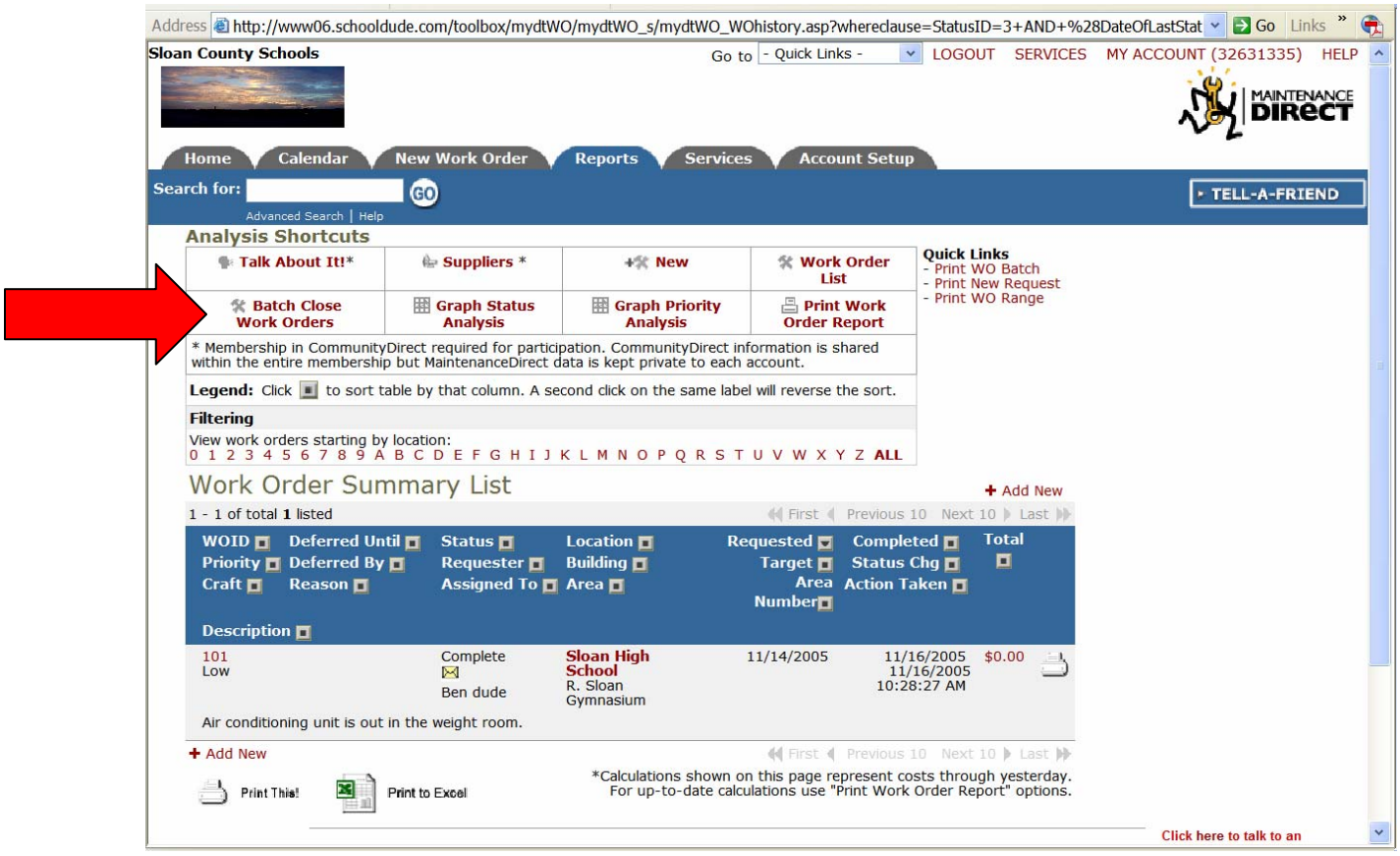
SCHOOLDUDE SAYS: Note that you can NOT delete a work order. This is mainly for record-keeping purposes.

To mark a work order as complete, simply change its status to "Complete". To close a work order, go in and change the status to "Closed Work Order". Save your changes by clicking the Save button. See below:



Closing Work Orders in Batches: You may find, at one time or another, that you want to mark work orders as complete and then close them later in a batch. In this case, do the following:

- Click on the number next to the "Complete" status on the Home page to get to the work order summary list.
- The "Batch Close Work Orders" option is on this page in the Shortcuts section. See below:



- Click the Batch Close Work Orders shortcut to close multiple work orders at a time. You will be able to close ten (10) work orders at a time.

- Select a status from the drop-down box labeled "**List Work Orders for Status**".

- Check all work orders that you would like to close. To close all the work orders in the list at once, click the Check All box provided.

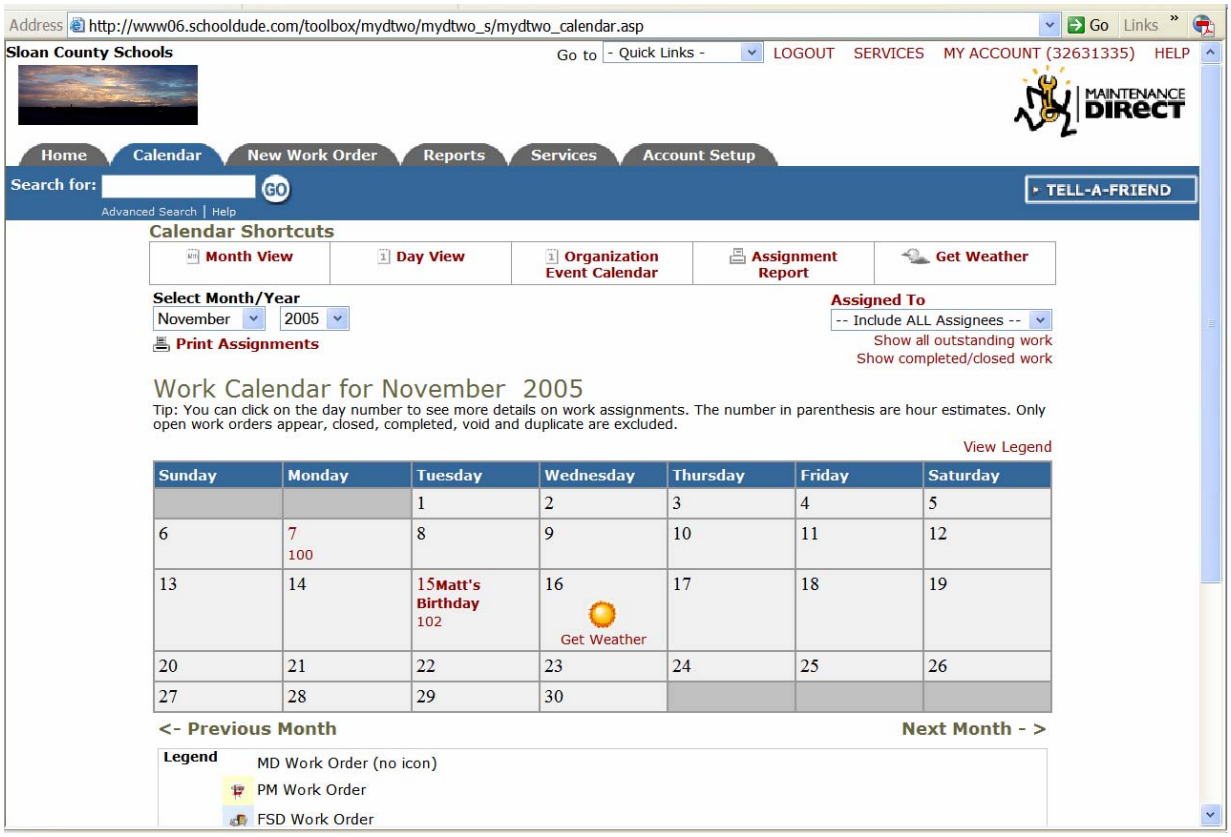
- To close the work order(s), click the Submit button. **Please remember to only click the Submit button once**. It may take a few seconds to change each of the work orders, but the page will refresh when complete.

VIII. Using the Calendar: See the Big Picture.

As with all other SchoolDude products, MaintenanceDirect has a Calendar tab—a place you can go to see what's going on, where, when, and who's involved. You can see, in easy-to-read calendar format, work orders entered on a month-to-month or year-to-year basis. You can even check the weather! In this section of your manual, we'll show you how to use the calendar and all of its options in the way that works best for you.

- To open up your calendar from wherever you are, click on the Calendar tab at the top of your screen.

The page that opens up will look something like this:


Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_calendar.asp
Go Links
Sloan County Schools
Go to - Quick Links - LOGOUT SERVICES MY ACCOUNT (32631335) HELP
MAINTENANCE DIRECT
Home Calendar New Work Order Reports Services Account Setup
Search for: GO
Advanced Search | Help
TELL-A-FRIEND
Calendar Shortcuts
Month View Day View Organization Event Calendar Assignment Report Get Weather
Select Month/Year
November 2005
Print Assignments
Assigned To
-- Include ALL Assignees --
Show all outstanding work
Show completed/closed work
Work Calendar for November 2005
Tip: You can click on the day number to see more details on work assignments. The number in parenthesis are hour estimates. Only open work orders appear, closed, completed, void and duplicate are excluded.
View Legend
Sunday Monday Tuesday Wednesday Thursday Friday Saturday
1 2 3 4 5
6 7 100 8 9 10 11 12
13 14 15 Matt's Birthday 102 16 Get Weather 17 18 19
20 21 22 23 24 25 26
27 28 29 30
<- Previous Month
Next Month - >
Legend
MD Work Order (no icon)
PM Work Order
FSD Work Order

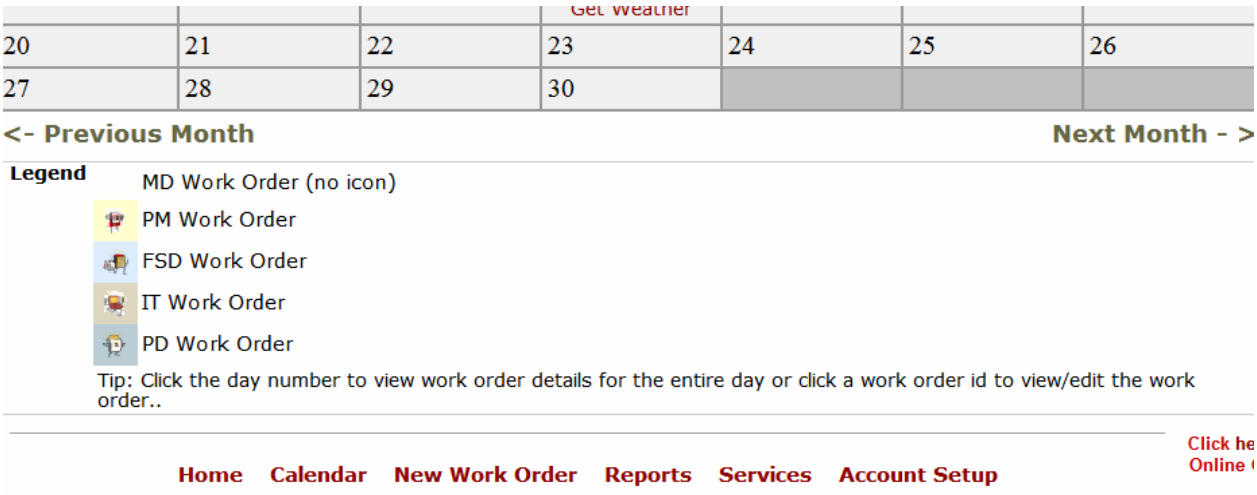
At the top of your screen, just above the words "Work Calendar for…", are the **Calendar Shortcuts**: **Month View**, **Day View**, **Organization Event Calendar**, **Assignment Report**, and **Get Weather**.
In this section, we'll cover each of these shortcuts in turn, starting with the Month View.

1. **The Month View** page shows you what's going on, on a large, easy-to-read calendar, one month at a time. It's the view that shows automatically when you open up the Calendar page—in other words, the page you're looking at now.

The month you're in currently will display with arrows in the bottom left and right-hand corners that you can click on to navigate to the **Previous Month** or **Next Month**. Just below the **Calendar Shortcuts**, you will see two drop-down boxes, one for the month and the other for the year, which serve as another kind of shortcut, allowing you to navigate the large calendar from one month to the next without clicking multiple times on the Previous Month and Next Month buttons.

On the **Month View**, each day shows in the traditional squares of a calendar, which contain any open work orders. Open work orders are those work orders not in the "Complete", "Closed", "Void", or "Duplicate" status.

There are different icons used throughout the MaintenanceDirect **Calendar** page to indicate what kind of work orders the work orders on the calendar are. The legend for these icons is at the bottom of the **Month View** page and looks like this:

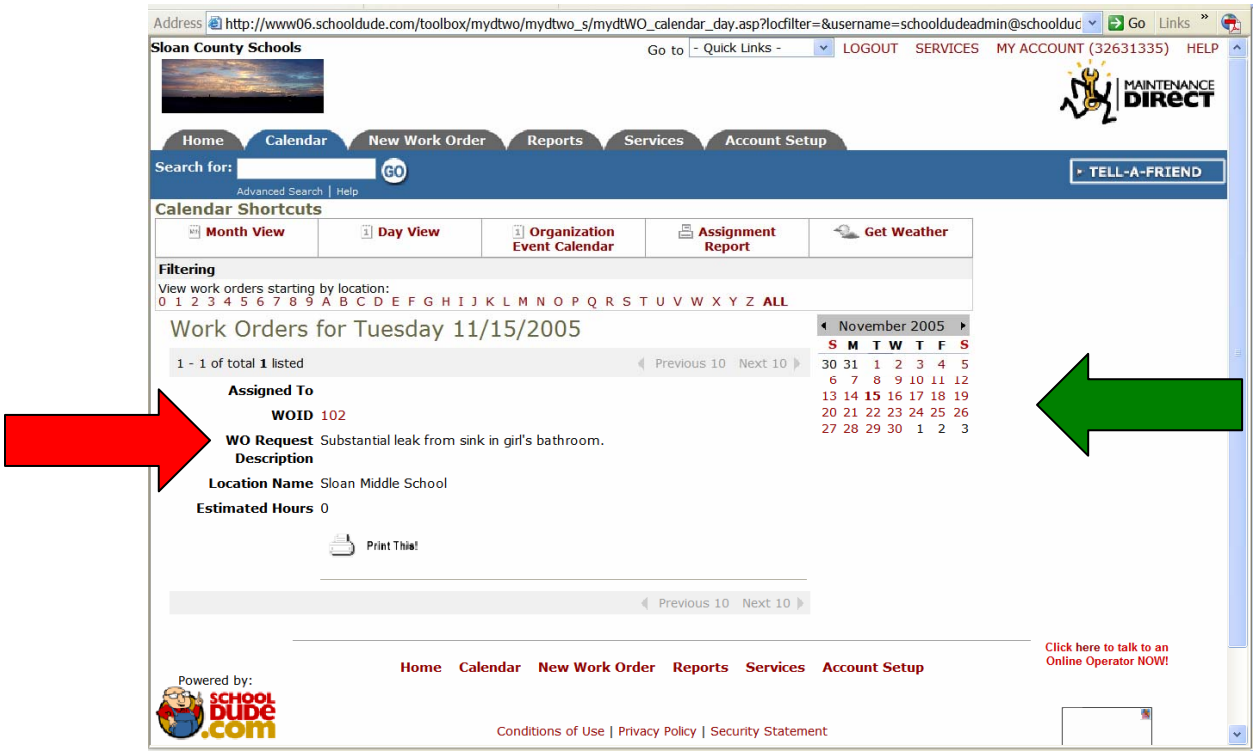


Work order numbers will be displayed on the calendar as red links and appear on the day of that work order's Target Start Date. If you click on a work order number, it will take you to the work order update screen. If you see a number in parentheses next to the WOID, that is the "Estimated Hours" for that work order.

If your educational facility or district has PreventiveMaintenanceDirect, PM work orders will show as having a yellow background on the calendar, behind the WOID.

2. **The Day View** page can be reached in two ways:
   - Clicking on the Day View shortcut at the top of the page, or
   - Clicking on the number of the date on the monthly calendar.

The **Day View** automatically defaults to today's date. It shows you what's going on, one day at a time. You will see who the work order was assigned to (if applicable), the WOID number, the Work Order Request Description, the Location Name, and the Estimated Hours (if applicable). See area marked with the red arrow below:

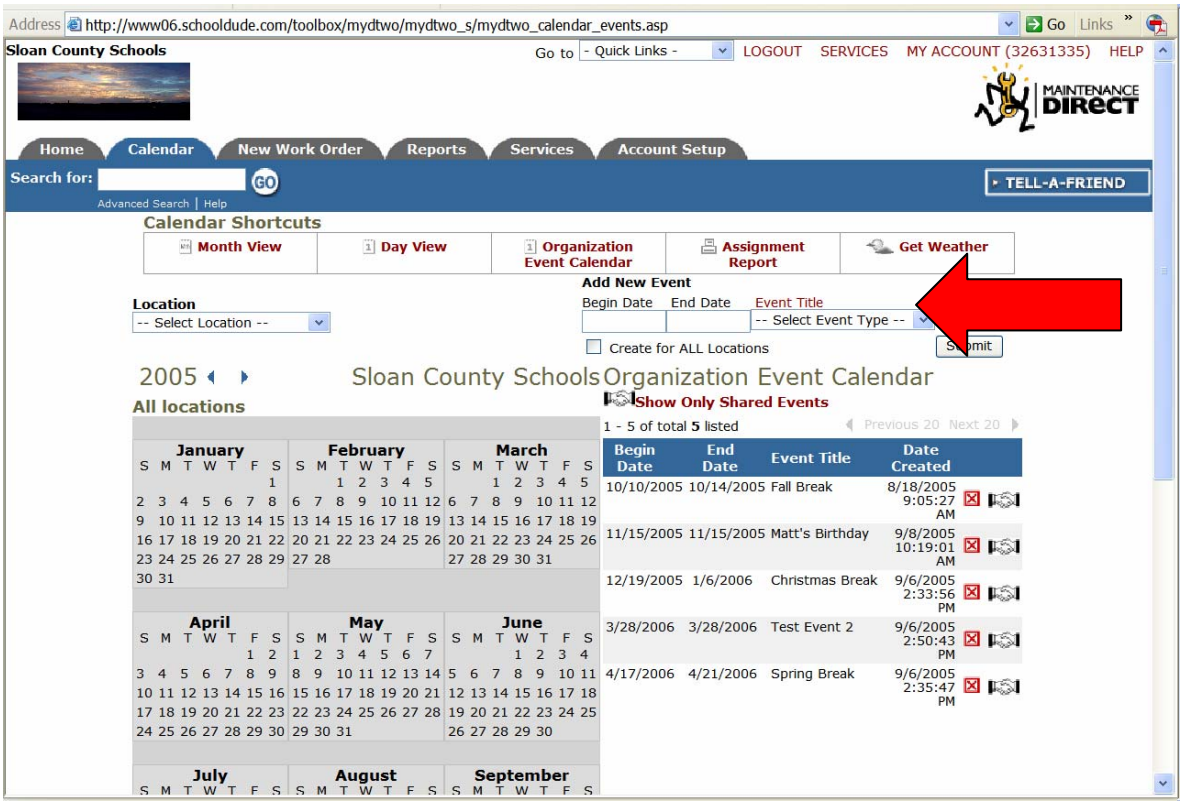


➢ You can navigate from one day to the next using the small calendar on the right-hand side of the screen (see green arrow above). Simply click the number of the day you wish to view. To move from one month to another, use the left and right arrows next to the name of the month at the top of the small calendar (see below).

➢ To print a form for a work order, click on the Print This button for the corresponding work order.

3. The **Organization Event Calendar** page is where you can view and enter events, such as school breaks, for locations/organizations within your school or district. They will then be stored on a yearly calendar on the left-hand side of the screen and then listed in more detail on the right-hand side.
You can reach the Organization Event Calendar by clicking on the short cut at the top of the Calendar page.

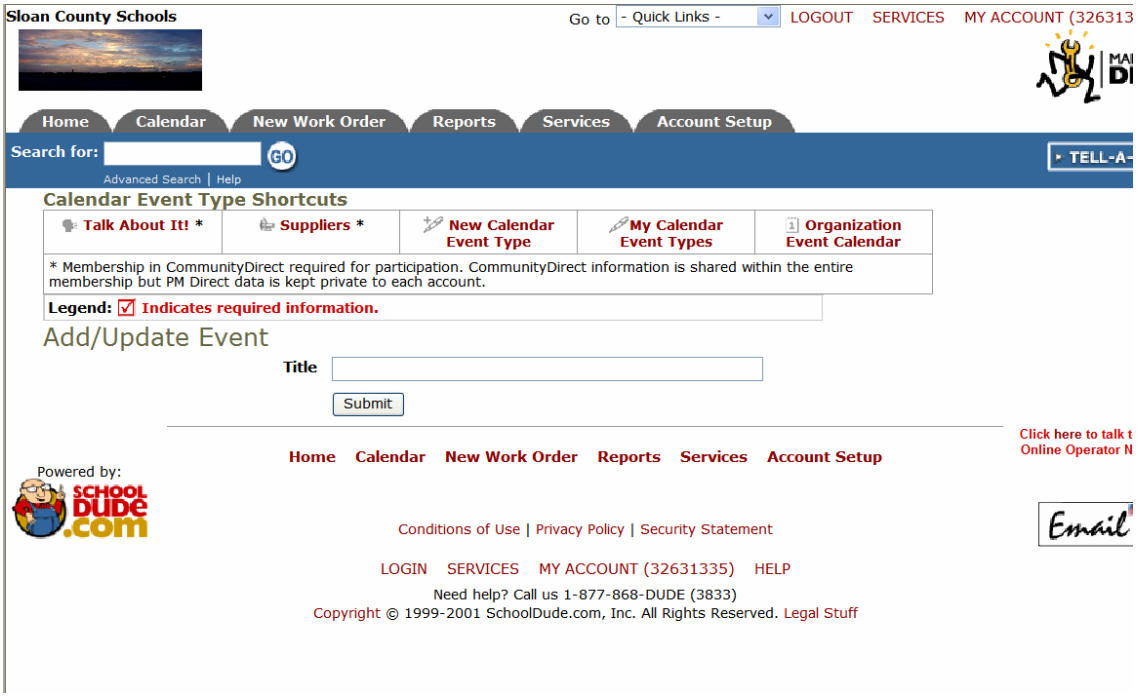
The **Organization Event Calendar** page should look something like this:



To enter an event into the **Organization Event Calendar,** you'll need to start by creating an **Event Title** for that event and proceeding from there:

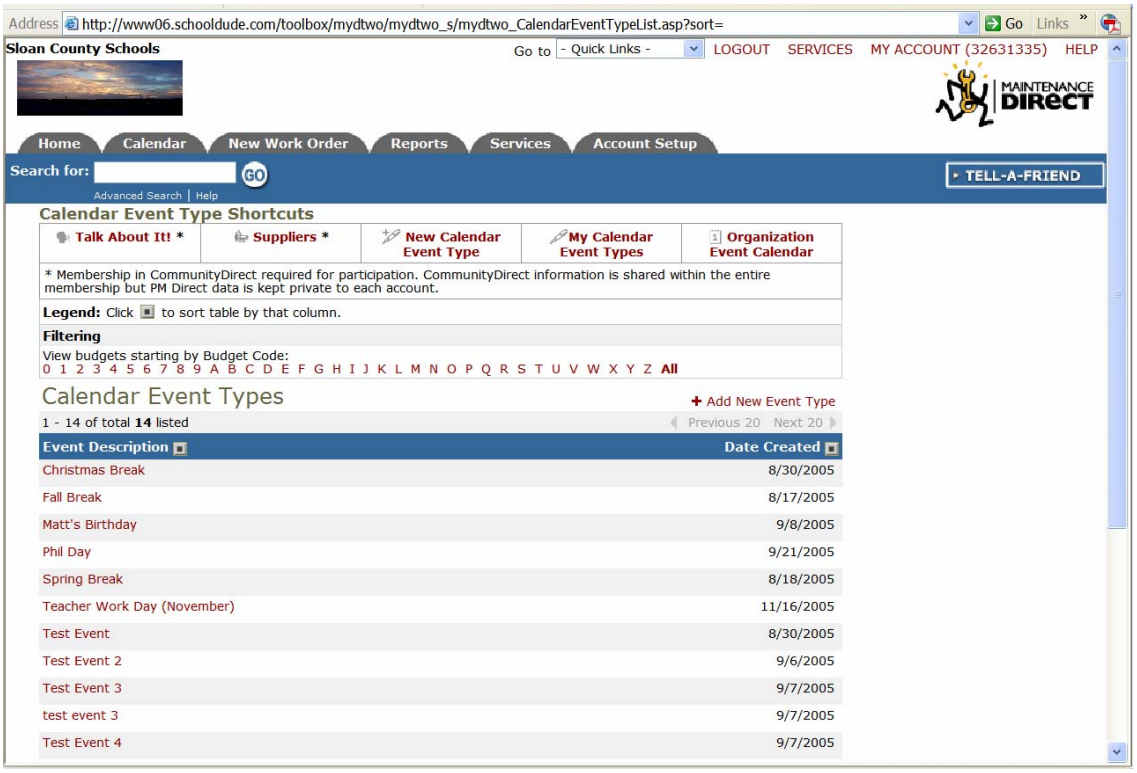
- To enter your **Event Title**, click on the Event Title link (shown in red above the Select Event Title drop-down box. See red arrow above).

- Clicking on the Event Title link will take you to a new page titled **Add/Update Event Code**. In the box provided next to the word Title, enter the title of the event. See next page:



- Click Submit.

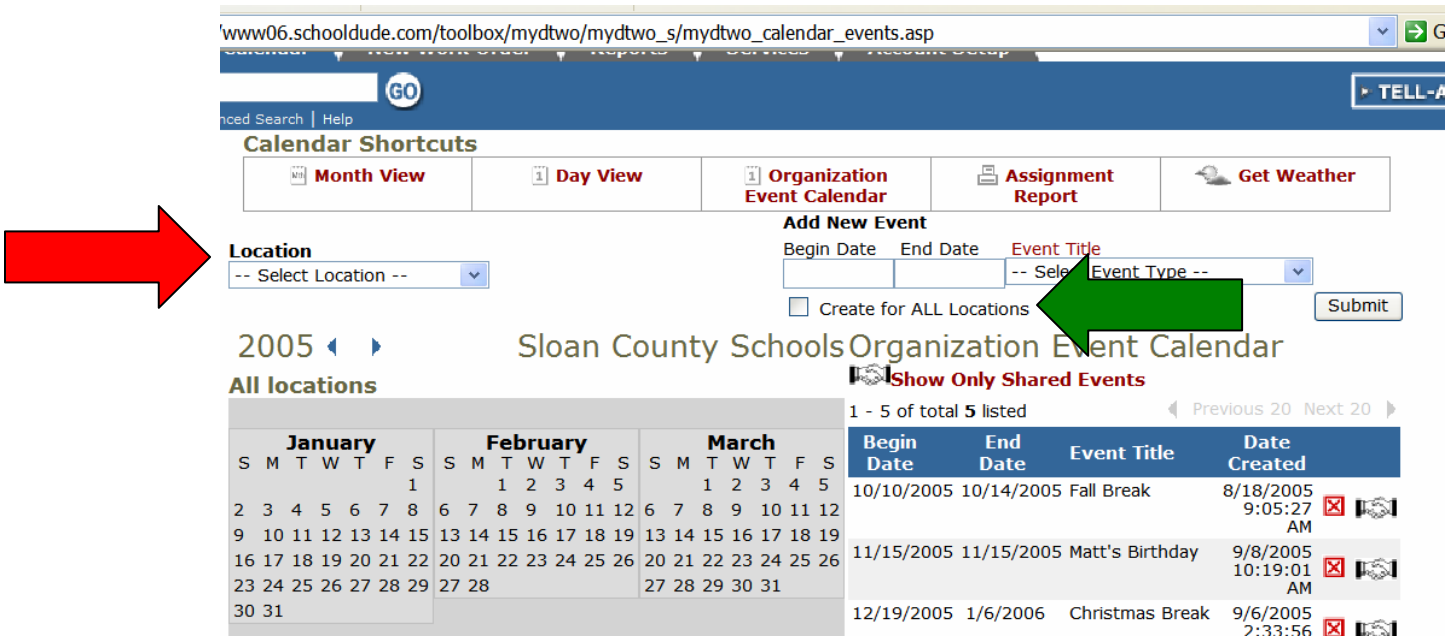
- You will then be taken to the **Calendar Event Types** page, which will look something like this, depending on the events you have or haven't entered yet:


Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_CalendarEventTypeList.asp?sort=
Go
Links
Sloan County Schools
Go to - Quick Links -
LOGOUT
SERVICES
MY ACCOUNT (32631335)
HELP
MAINTENANCE DIRECT
Home
Calendar
New Work Order
Reports
Services
Account Setup
Search for:
GO
Advanced Search | Help
TELL-A-FRIEND
Calendar Event Type Shortcuts
Talk About It! *
Suppliers *
New Calendar Event Type
My Calendar Event Types
Organization Event Calendar
* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but PM Direct data is kept private to each account.
Legend: Click to sort table by that column.
Filtering
View budgets starting by Budget Code:
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All
Calendar Event Types
+ Add New Event Type
1 - 14 of total 14 listed
Previous 20
Next 20
Event Description
Date Created
Christmas Break 8/30/2005
Fall Break 8/17/2005
Matt's Birthday 9/8/2005
Phil Day 9/21/2005
Spring Break 8/18/2005
Teacher Work Day (November) 11/16/2005
Test Event 8/30/2005
Test Event 2 9/6/2005
Test Event 3 9/7/2005
test event 3 9/7/2005
Test Event 4 9/7/2005

- Return to the **Organization Event Calendar** page by clicking on the Organization Event Calendar shortcut at the top of the page.

Your event's title has been entered, but the event itself still isn't on the calendar so to put it on the calendar, continue with the following:

- Select the Location for the event from the drop-down box provided just under the shortcuts section (see red arrow below). If this event will be for **ALL** locations, click the check box next to "**Create for ALL Locations**". See green arrow below:



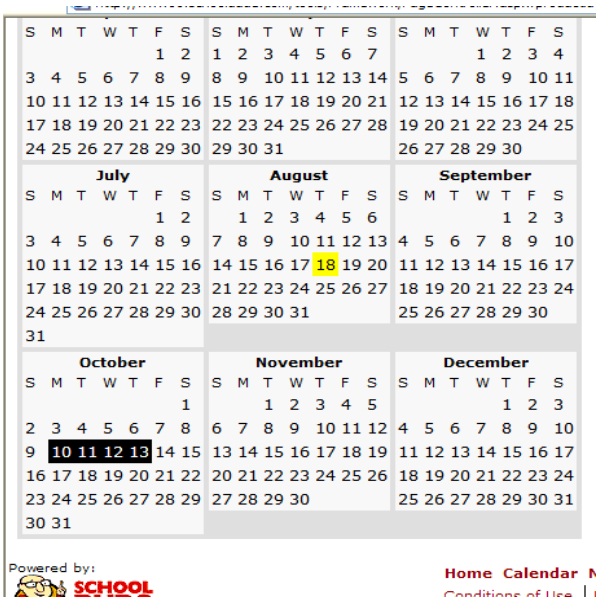
- Next, enter the Begin and End Dates of the event in the boxes provided.
- Choose the Event Title that you entered earlier from the "Select Event Type" drop-down box provided.
- Click Submit.

When the page refreshes, you will see that the new event has been added, both to the list on the right-hand side of the screen as well as blocked out in black on the calendar on the left-hand side of the screen.

Few More Things About the Calendar:

When you enter an event into the Organization Event Calendar, that event's date or dates will show as highlighted in black on the yearly event calendar on the left-hand side of the page.

Below is an example which shows that Fall Break will be from October 10-14. Its dates have been highlighted in black on the calendar.



- To delete an Event entered onto the list and the calendar on the **Organization Events Calendar** page, simply find that item on the list and click the ☒ on the right-hand side, next to the event you wish to delete (see next page).

- To edit an Event's information once it's been entered into the Organization Event Calendar, enter the Event again into the calendar, using the corrected information, and then delete the previously entered incorrect Event from the list.

- To show only "**Shared**" events, that is, events shared by all Locations, click on the Show Only Shared Events link (shown in red) next to the clasped hands icon (🤝) on the **Organization Events Calendar** page. This link is located above the list of events (see next page).

Schools Organization Event Calendar
Show Only Shared Events
1 - 6 of total 6 listed
Previous 20 Next 20
March
W T F S
2 3 4 5
9 10 11 12
16 17 18 19
Begin Date
End Date
Event Title
Date Created
10/10/2005
10/14/2005
Fall Break
8/18/2005 9:05:27 AM

4. The **Get Weather** shortcut, as with the weather icon on the main monthly calendar and the **Home** page, serves as a link to connect you with AccuWeather.com, where you can check current weather conditions in your area or the area where work orders are being done. You can also check the forecast with a range up to fifteen days.

- Simply click on the Get Weather shortcut near the top of the page and a separate browser page will pop up, displaying AccuWeather.com.

- Enter your Zip Code or City/State into the box shown above and click Go.

IX. Reports: Listing, Printing, and Graphing Your Work Orders.

SchoolDude provides you with the options of listing, graphing, and printing any and all of your work orders, along with their information, for your convenience and for your records. Follow the steps in this section and you'll have hard copies and visual aids for all of your work order information at your fingertips.

- The types of reports available in MaintenanceDirect are summarized in the following tables:

Budget Codes:

Report Types	Report Information
Summary	The budget summary report will give a summary of all labor hours, labor and material costs, total costs, budget amount, percentage spent, work order count and average hours/cost for each budget code. You can sort the report by budget code or by location.
Detail	The budget detail report will give you a detailed account of each transaction for work orders assigned to the budget codes. You can sort this report by budget code or by location. If you want to have a page break for each budget code or location, check the page break option.
Fiscal Year-end Comparison	The budget year-end comparison will display all the information from the summary report for the current fiscal year, as well as the previous fiscal year. You can sort the report by budget code or location

Classifications:

Report Types	Report Information:
Summary	The classification summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each classification.
Detail	The classification detail report will give you a detailed account of each transaction for work orders assigned the selected classifications.

Crafts:

Report Types	Report Information
Summary	The craft summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each craft. You can sort the report by location or craft.
Detail	The craft detail report will give you a detailed account of each transaction for work orders that are assigned the selected crafts.

Employees:

Report Types	Report Information
Summary Count	The employee summary count will give you a summary of each employee and how many work orders they are assigned in each work order status.
Estimate vs. Actual Analysis	This report will show all estimated and actual employee hours and costs on one report.
Detail Employee Counts	The detail employee count report will give you a listing of all the work orders that an employee has been assigned, as well as a total count. The report will show the work order number, requester, and the description for each work order.
Detail Employee Cost	The detail employee cost lists each employee and their total hours worked, average number of hours per work order, the total cost, the average cost per work order, and the number of work orders.
Employee Productivity	The employee productivity report will list each employee, the work orders assigned to them, and the number of days to complete those work orders. It will also give the total and an average number of days to complete.

Equipment:

Report Types	Report Information
Summary (All)	The equipment summary report will give you summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each piece of equipment.
Detail (All)	The equipment detail report will give you a detailed account of each transaction for work orders assigned the selected equipment.
Summary (Maintenance vs. Preventive Maintenance)	The equipment summary report (maintenance vs. preventive maintenance) will give you a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per piece of equipment. The maintenance and preventive maintenance will be separated for comparison.
Detail (Maintenance vs. Preventive Maintenance)	The equipment detail report (maintenance vs. preventive maintenance) will give you a detailed account of each transaction for work orders that are assigned the selected equipment. The maintenance and preventive maintenance will be separated for comparison.

Equipment Usage:

Report Types	Report Information
Summary (Equipment Costs)	The equipment summary report will give you summary of all usage purchases for each piece of equipment.
Detail (Equipment Costs)	The equipment detail report will give you a detailed account of each usage transaction for work orders assigned the selected equipment.
Summary (Work Order Costs)	The equipment summary report will give you a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per piece of equipment
Detail (Work Order Costs)	The equipment detail report will give you a detailed account of each transaction for work orders that are assigned the selected equipment.

Groups: *This is only used if you import a code schema.*

Report Types	Report Information
Summary	The group summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each group.
Detail	The group detail report will give you a detailed account of each transaction for work orders that are assigned the selected groups.

Transactions:

Report Types	Report Information
Summary	The transaction summary report will give a total quantity and cost for a group of transactions. For example, you can print a report for a technician for the total number of hours they worked that month. You can also print a report showing all the purchases from a specific supplier. You can sort this report by transaction type or location.
Detail	The transaction detail report will give you the total quantity and cost of a group of transactions, like the summary report. It will also list all the transactions that make up the total cost. You can sort this report by transaction type or location.

Locations:

Report Types	Report Information
Summary	The location summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per location.
Detail	The locations detail report will give you a detailed account of each transaction for work orders assigned the selected locations.

Manufacturers:

Report Types	Report Information
Summary	The manufacturer summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per manufacturer.
Detail	The manufacturers detail report will give you a detailed account of each transaction for work orders assigned to the manufacturers.

Outstanding Work:

Report Types	Report Information
List	This list will display all open work orders that are in the status of "New Request", "Work in Progress", or "Pending".

Projects:

Report Types	Report Information
Summary	The project summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per project.
Detail	The projects detail report will give you a detailed account of each transaction for work orders that are assigned the selected projects.

Purpose:

Report Types	Report Information
Summary	The purpose summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per purpose.
Detail	The purpose detail report will give you a detailed account of each transaction for work orders that are assigned the selected purpose.

Status:

Report Types	Report Information
Summary	The status summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per status.
Detail	The status detail report will give you a detailed account of each transaction for work orders that are assigned the status projects.

Suppliers:

Report Types	Report Information
Master List	The master list will print out all supplier information in list format.
Summary	The supplier summary report will give you a summary of total costs from this supplier.
Detail	The supplier detail report will display all the transactions that make up the total costs from this supplier.

Types:

Report Types	Report Information
Summary	The type of summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per type.
Detail	The type detail report will give you a detailed account of each transaction for work orders assigned the selected types.

Work Load:

Report Types	Report Information
Calendar	This report will take you to the calendar, where you can print an assignment report.

Work Orders:

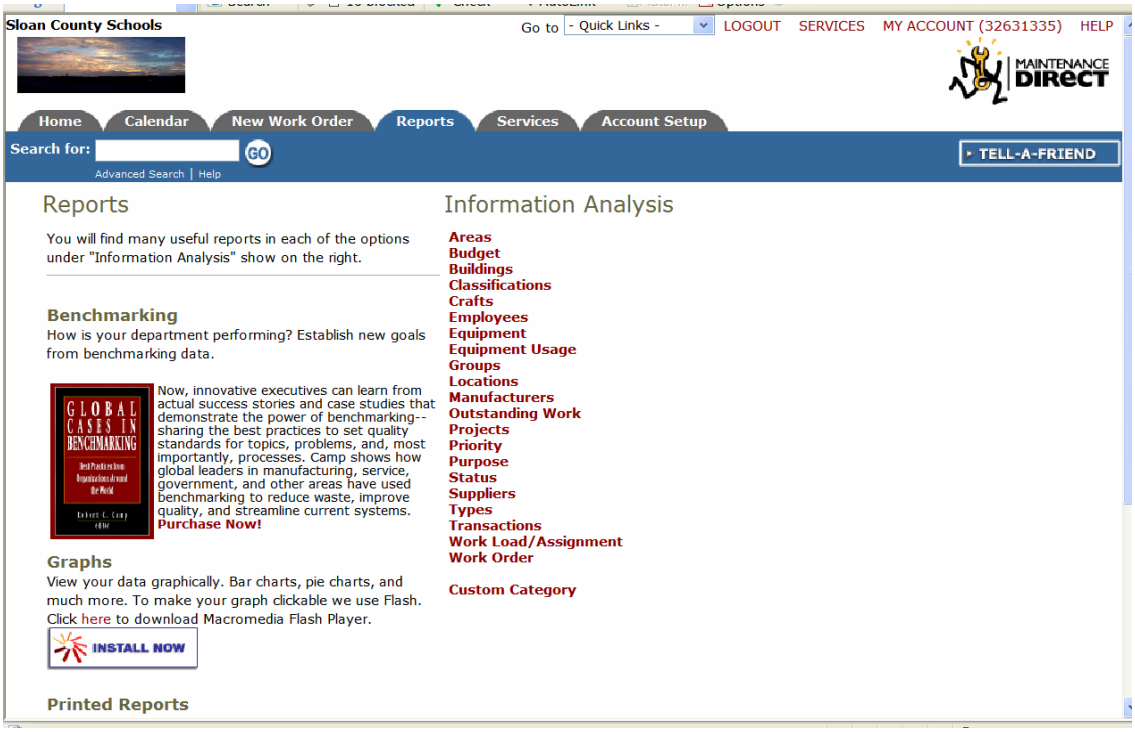
Report Types	Report Information
Summary	The work order summary report will give you a summary of each employee and the count of how many work orders they are assigned in each work order status.
Summary 2	The work order summary 2 report will give you a listing of all the work orders, based on your criteria. You can sort this list by status, date, work order ID, location, priority, assigned employee, budget, project, purpose, or craft.
Detail	The detail report will give you a full report for each work order in the criteria that you've selected. The detail report is several pages per work order.
Detail Analysis Pivot Graph	The detail analysis pivot graph is available for Microsoft Excel only. It provides a way to customize a work order count report and graph.

Custom Category:

Report Types	Report Information
Summary	The custom category summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each custom category.
Detail	The custom category detail report will give you a detailed account of each transaction for work orders that are assigned the selected custom categories.

Listing:

1. Go to the **Information Analysis** section of MaintenanceDirect, either on the **Home** page, or by clicking on the **Reports** tab from wherever you are in MD. The **Reports** page looks something like this:



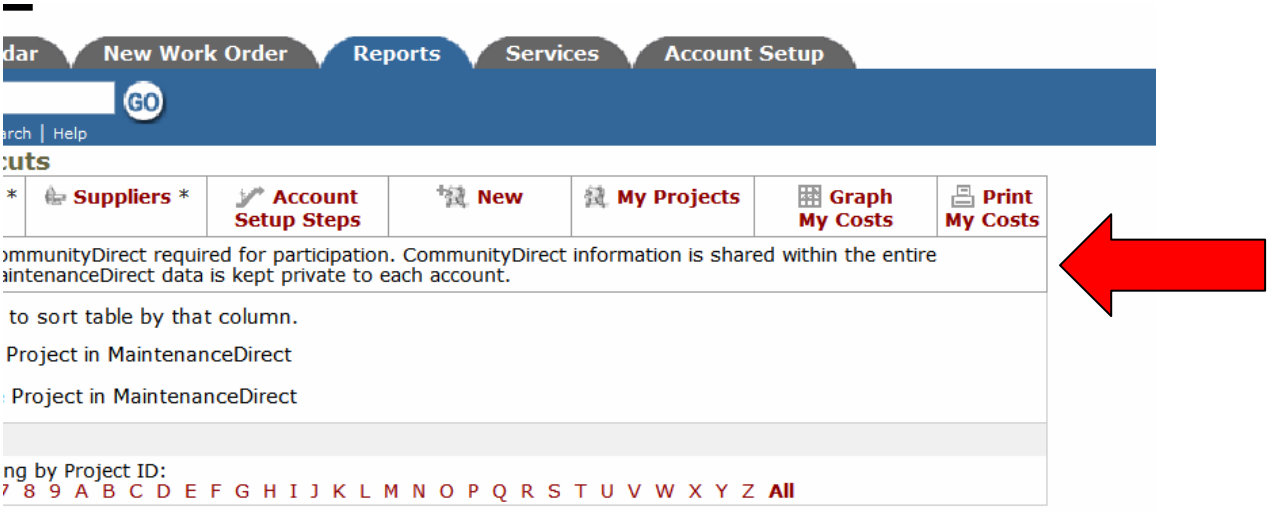
2. Under the Information Analysis section, click on the category you wish to list.

3. No matter what category you click, you will find the list link in the Shortcuts section, though it may have different names:
   - ✓ Area List
   - ✓ My Budget Codes
   - ✓ My Buildings
   - ✓ My Classifications
   - ✓ Craft List
   - ✓ Employee Status Counts
   - ✓ My Equipment List
   - ✓ My Equipment Usage List
   - ✓ My Groups
   - ✓ Transaction List
   - ✓ My Locations
   - ✓ My Manufacturers
   - ✓ Work Order List
   - ✓ My Projects

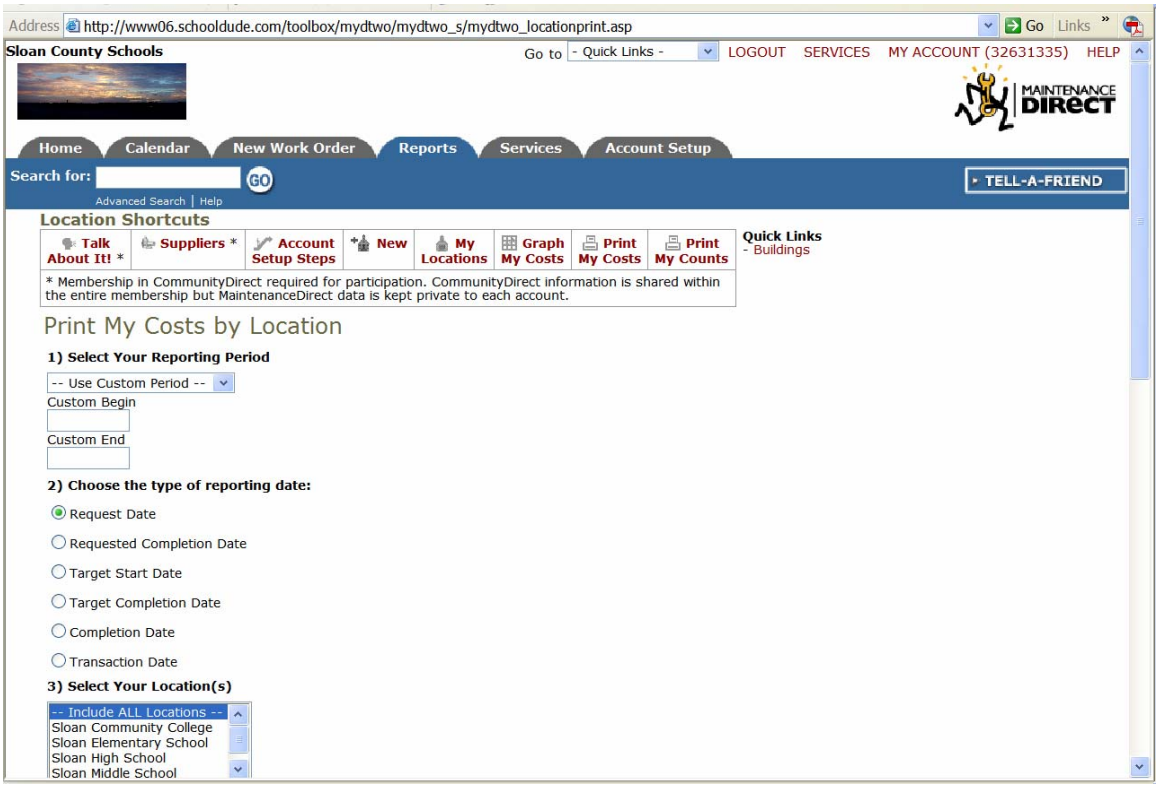
- ✓ My Priority Codes
- ✓ My Purpose Codes
- ✓ Status List
- ✓ My Suppliers
- ✓ My Types
- ✓ List Custom Category

Printing:

4. After you find the information you want by using the **Information Analysis** menu and clicking the appropriate link, look for the "**Print My** …" icon in the shortcuts menu. See example below:


New Work Order
Reports
Services
Account Setup
GO
Help
Suppliers *
Account Setup Steps
New
My Projects
Graph My Costs
Print My Costs
mmunityDirect required for participation. CommunityDirect information is shared within the entire
intenanceDirect data is kept private to each account.
to sort table by that column.
Project in MaintenanceDirect
Project in MaintenanceDirect
ng by Project ID:
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

- Follow the instructions on the appropriate page (the page below is shown as an example), filling out the necessary information and choosing the period you wish to print, etc.



- When you're finished, click the Print This! icon at the bottom of the page.

  ➢ You can also print any page that has a "**Print This!**" icon on it:

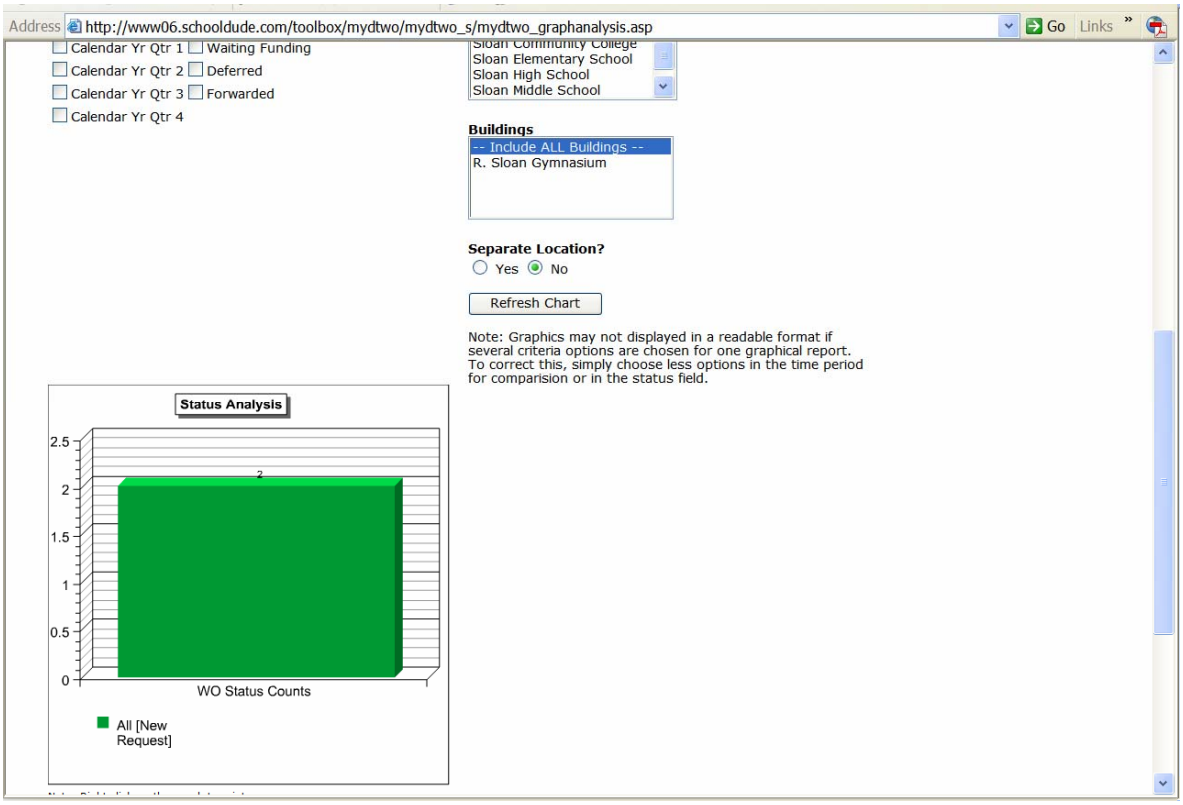
Graphing:

5. If you wish to view a graph of certain information, follow steps 1 through 3 above, using the **Information Analysis** menu and choosing the category you wish to view. Then do the following:

    - Follow the instructions on the appropriate page, which will take you through the period, priority, location, "Assign to" person, chart title and type, etc.

    - Click the Refresh Chart button. A chart will appear at the bottom of the page, graphing out the information you indicated above.

    - Change the information shown on the graph by changing the options above the chart.



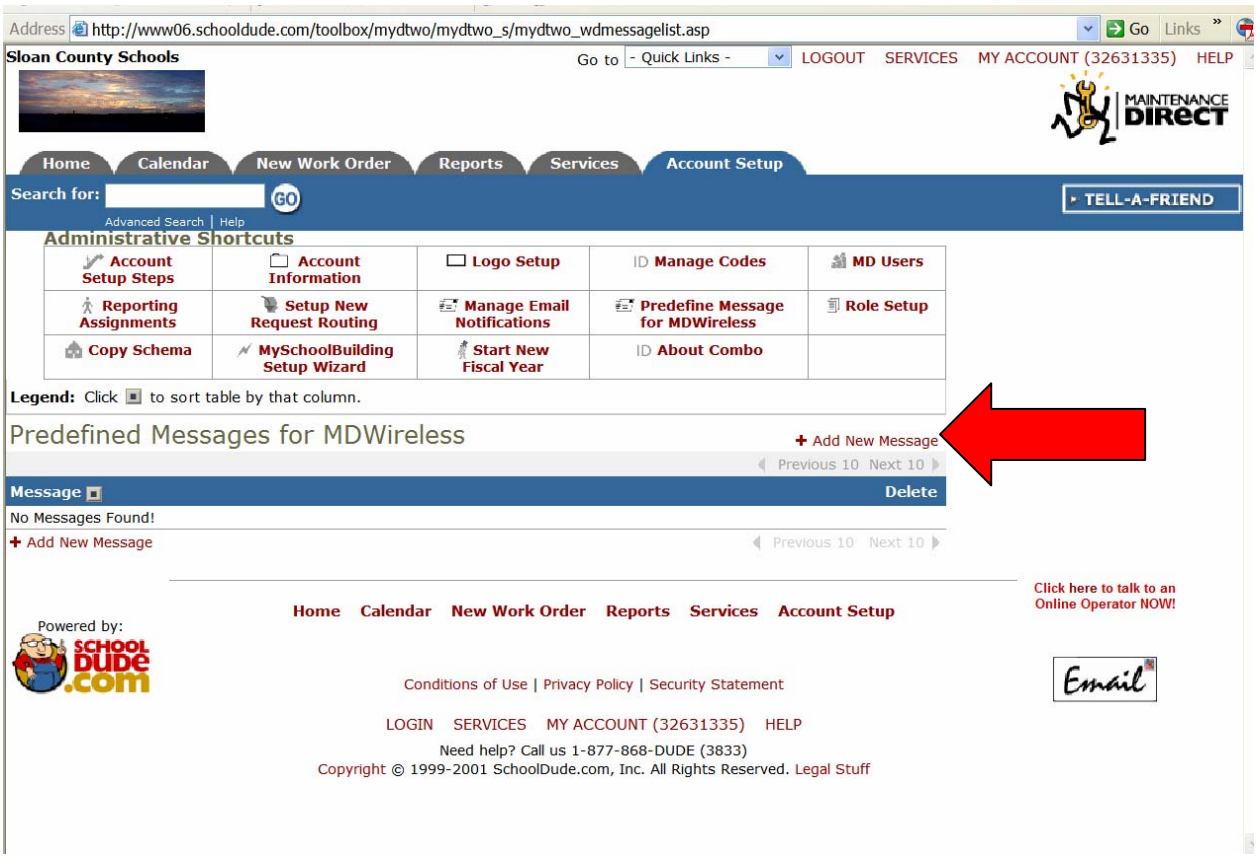
X. MaintenanceDirect Wireless: Take Us With You.

MaintenanceDirect Wireless is a wireless/mobile work order management tool that enables mobile maintenance and operations professionals to receive and complete work in the field via a wireless/mobile device. If you will be using MDWireless, welcome aboard and let's get started!

In this section, we'll walk you through the **Predefined Messages for MDWireless** section of the Account Setup process, where you can enter messages that you know can be used frequently, over and over, without having to write them repeatedly each time they are needed.

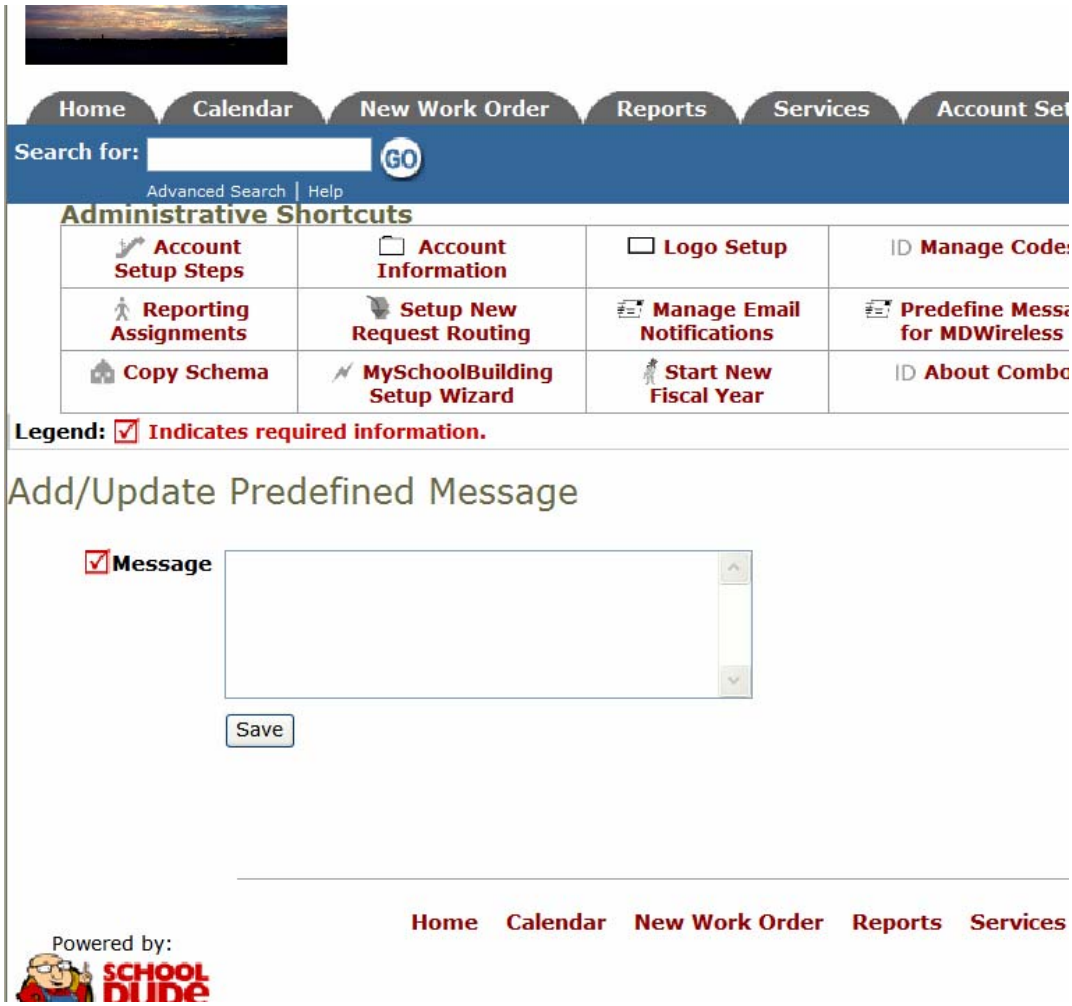
- On the Account Setup page, click on the Predefine Messages for MDWireless link.

- You will be taken to the **Predefined Messages for MDWireless** page, which will look something like this:



- You will see the words "No Messages Found!" underneath the Message list. To get started adding messages, click the +Add New Message link, shown above.

- On the **Add/Update Predefined Message** page, enter your message into the box provided. See below:



- Click Save.

- Continue entering messages until you think you've covered all your bases with message scenarios.